DDRS Crisis Product

User Guide

Table of Contents

Table of Contents

1. The CORM Product

The Crisis / Outreach / Risk Management (CORM) product is a web-based application that provides real-time access to developmentally disabled (DD) consumer information in the Division of Disability and Rehabilitative Services (DDRS) case management system. By using the CORM product, you can deliver Crisis, Outreach, and Risk Management support to consumers on behalf of DDRS.

1.1. How to Use the DDRS Crisis User Guide

The *DDRS Crisis User Guide* is intended to provide information about the user interface, features, and functionality of the Crisis section of the CORM software product. The guide includes hypertext links that you can use to move to related topics. You can also select a topic heading in the Table of Contents on Page 2 to move to that topic.

For more information about the Outreach section of the CORM software product, refer to the *DDRS Outreach User Guide*.

1.2. Product Support

You can access the most recent version of this guide and other CORM-related documents online. Use the following website URL to access the CORM document library in the DDRS website:

https://myshare.in.gov/fssa/ddrs/CORM/Forms/AllItems.aspx

If you encounter a problem with the Crisis product, or if you have a question or recommendation regarding this user guide, log a HelpBox request. A member of the FSSA Technology Services Team (FTST) will contact you to address the issue.

2. System Setup and Login

Before you can use the CORM product, you must:

- Determine whether your system meets the recommendations for running the CORM product.
- Set Microsoft Internet Explorer as your default Internet browser.
- Download and install the CORM product.
- Log in to the CORM product.

2.1. System Recommendations for Running the CORM Product

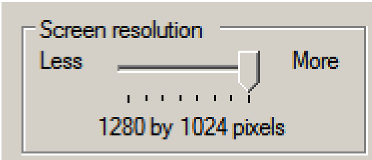
For best results, run the CORM product with the following parameters:

- 1024 x 768 pixels screen resolution
- Internet Explorer as your default browser
- Latest version of Adobe Reader
- A high-speed Internet connection (for example, DSL, cable modem, or T1 line)

2.1.1. Setting the Screen Resolution on Your Computer

For best results while viewing the CORM product interface, your computer screen resolution should be set to 1024 x 768 pixels or higher. Use the following procedure to set the screen resolution on your computer to the highest setting.

1. Right-click on your desktop and select **Properties** from the shortcut menu. The **Display Properties** window appears.
2. Select the **Settings** tab.
3. Drag the slider in the Screen resolution section as far to the right as possible to increase the screen resolution to the highest setting. The following illustration shows an example of the Screen resolution section of the **Display Properties** window:



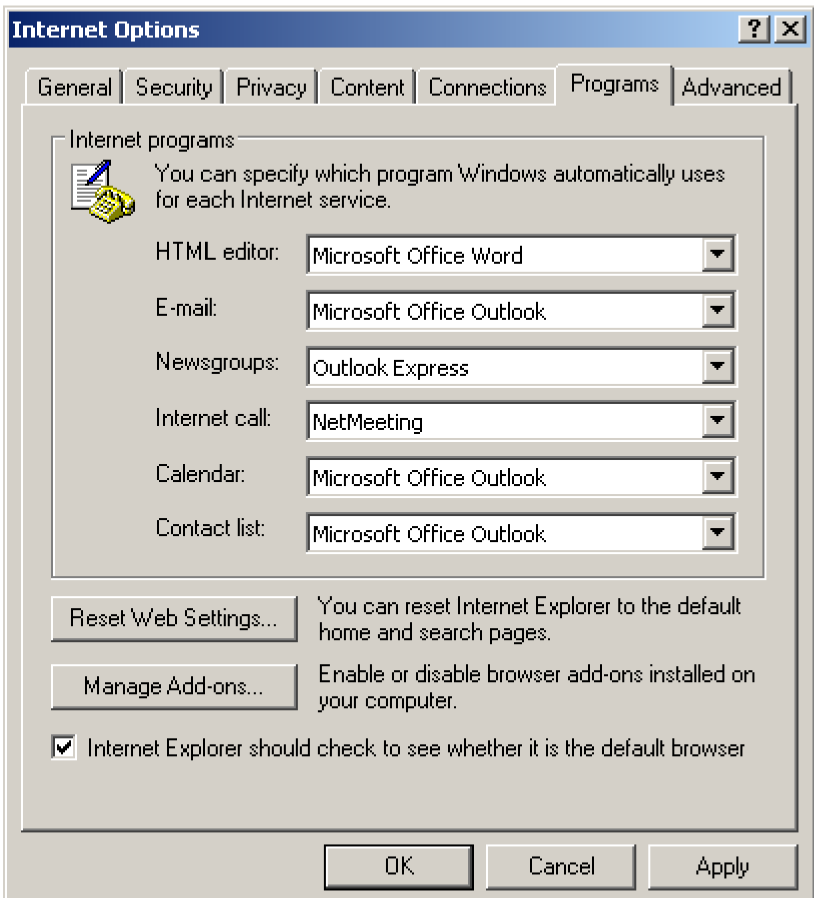
4. Select **Apply** and then **OK**.

2.1.2. Setting Microsoft Internet Explorer as Your Default Internet Browser

Before downloading the CORM product, you must verify that Microsoft Internet Explorer is set up as your default Internet browser. If your system uses a different browser, you can use the following procedure to set Internet Explorer as your default Internet browser.

1. Open Internet Explorer and select the **Tools** menu.

2. Select **Internet Options**. The **Internet Options** window appears, as shown in the following illustration:



3. Select the **Programs** tab in the **Internet Options** window.

4. Verify that the **Internet Explorer should check to see whether it is the default browser** check box is checked.

5. Select **Apply** and then **OK**.

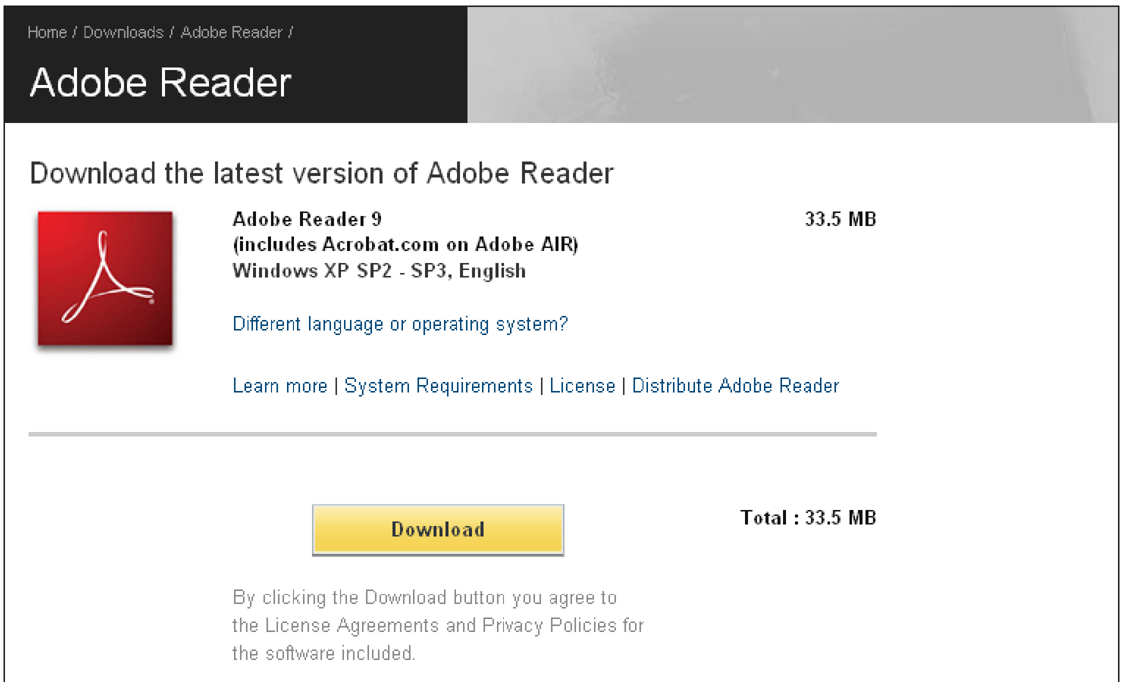
2.1.3. Installing and Testing the Latest Version of Adobe Reader

You can access the most updated copy of this user guide and other documentation from the DDRS website. To view the documents, you must install the Adobe Reader on your computer. Use the following procedure to install and test the latest version of Adobe Reader on your computer (the procedure assumes that you have not installed the Adobe DLM ActiveX control).

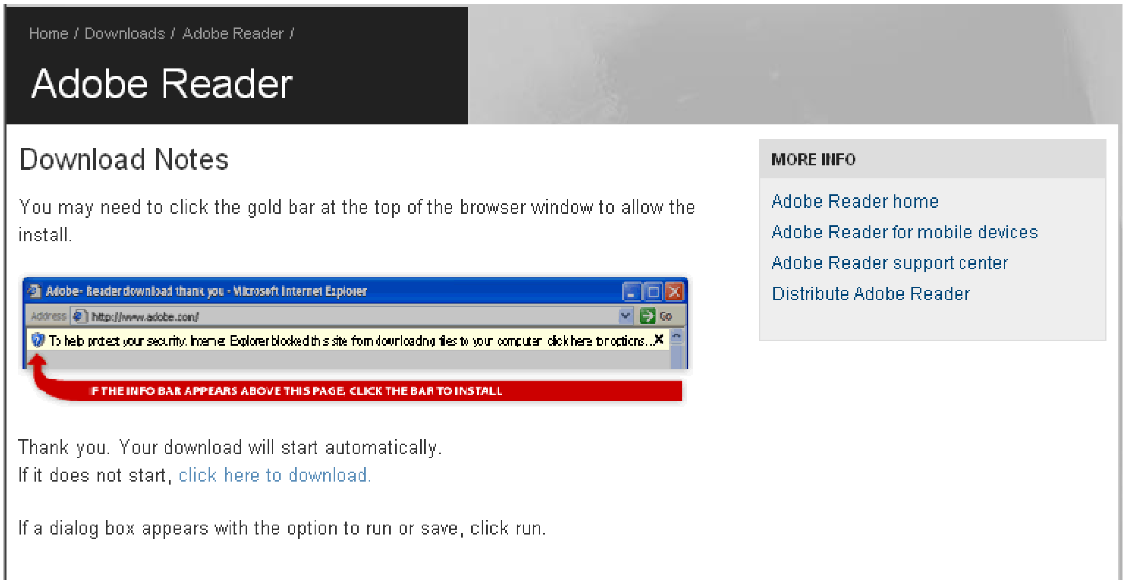
1. Select the following link or enter the URL into the **Address** field of your browser:

   http://www.adobe.com/products/acrobat/readstep2.html

   The Adobe Reader web page appears, as shown in the following illustration:



2. Select the gold **Download** button. The system displays the following screen and a gold bar appears at the top of your browser window:



3. Select **Click here to install** from the gold bar at the top of the browser window, and then select **Install ActiveX Control** from the shortcut menu that appears.

4. Select **Install** in the **Internet Explorer - Security Warning** window that appears.

5. Wait several seconds as one or more Adobe progress windows appear, indicating the progress of the installation. When the installation is complete, the **getPlus: Info** window appears and indicates that the installation is complete.

6. Select **OK** in the **getPlus: Info** window.

7. Test the Adobe Reader installation by selecting a PDF file from either the network or a SharePoint site.

Tip
Select the following link to display a SharePoint page that contains multiple PDF files that you can use:

https://myshare.in.gov/FSSA/ddrs/WebBased%20Tools/Forms/AllItems.aspx

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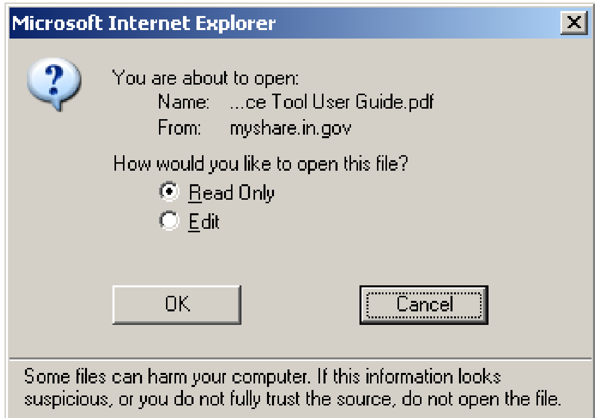
8. Ensure that the **Read Only** radio button is selected in the **Microsoft Internet Explorer** window that appears and then select **OK**.

The following illustration shows an example of the **Microsoft Internet Explorer** window:



Because this is the first PDF you have opened after installing the Adobe Reader, the **Adobe Reader – License Agreement** window appears, as shown in the following illustration:

9. Select **Accept** to display the PDF file for the document you selected.

   The **Adobe Reader – License Agreement** window appears only once. After you perform the remaining steps in this procedure, the license agreement will not appear again when you select a PDF file.

2.2. CORM Download and Installation

To use the CORM product, you must first install the interface software to your PC. Use the following procedure to download and install the CORM software.

Important

The CORM product uses the Microsoft .Net Framework 3.0 programming model, which requires that a user with administrative rights perform the installation. Subsequent user-specific setup and use of the CORM product does not require administrative rights.

If your PC does not have the Microsoft .Net Framework 3.0 programming model, the system loads it automatically and then resumes the CORM installation.

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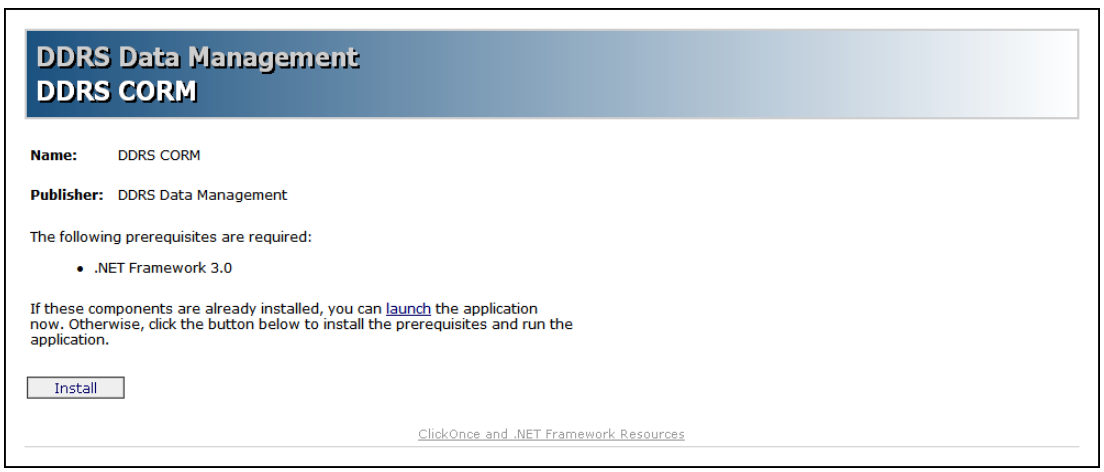
1. Select the following link or manually enter the following URL into your browser's **Address** field:

   http://ddrsprovider.fssa.in.gov/corm/publish.htm

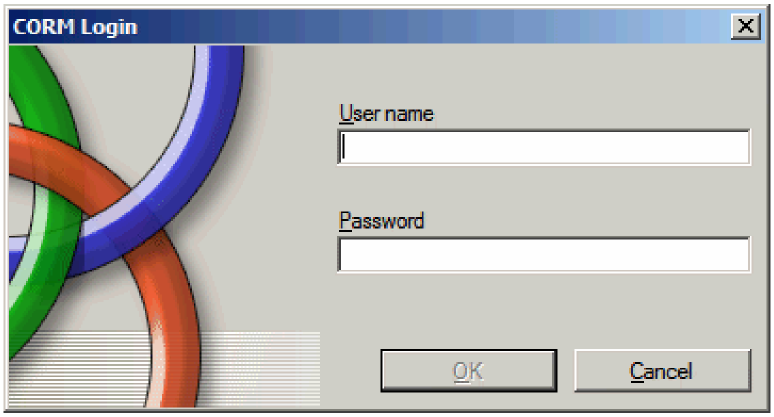
   The following screen appears:



2. Select **Install.**
3. Select **Run** in the **File Download – Security Warning** window.
4. Select **Run** in the **Internet Explorer – Security Warning** window.
5. Select **Install** in the **Application Install – Security Warning** window.

2.3. CORM Login

After the system completes the CORM installation procedure, the **CORM Login** window appears. The following illustration shows an example of the **CORM Login** window:



Enter your user name and password, and then select **OK**. During the login process, the CORM product evaluates your user information to determine your user role (for example, Crisis or Outreach) and access level. The system modifies the appropriate windows, tabs, and menus according to your role, and applies the appropriate capability limitations. For example:

- Crisis-related windows and tabs display read-only information for an Outreach user, and vice versa.
- If your role is a manager, you can perform additional functions, such as closing and deleting episodes.

3. Concepts and Terminology

A consumer is a person with a developmental disability who receives Crisis or Outreach services. While *client*, *customer*, and *individual* are also terms used to describe a consumer in other documentation or programs, every effort has been made to use *consumer* exclusively in the CORM product and product documentation.

3.1. Episode

An episode is an event or situation that requires input into the CORM product. A CORM episode describes the time period of the situation and the activities that occur. Most episodes consist of a clear beginning and end, and can involve multiple individuals who add a service entry and service note to the CORM product to document their efforts.

3.2. Read-Only User Role

The Read-Only user role limits the menus that are available to a user and limits the user's capabilities on the system. You must contact the FTST via HelpBox to request that a user be assigned this role. For more information about the Read-Only role, refer to Section 6.7: Viewing Episodes as a Read-Only User.

3.3. Service Entry

A service entry is a line of information that describes an action (for example, the initial call, a referral, or an in-home consultation) that occurred on an episode. Service entries appear in a grid in the work area. The grid contains several columns of information.

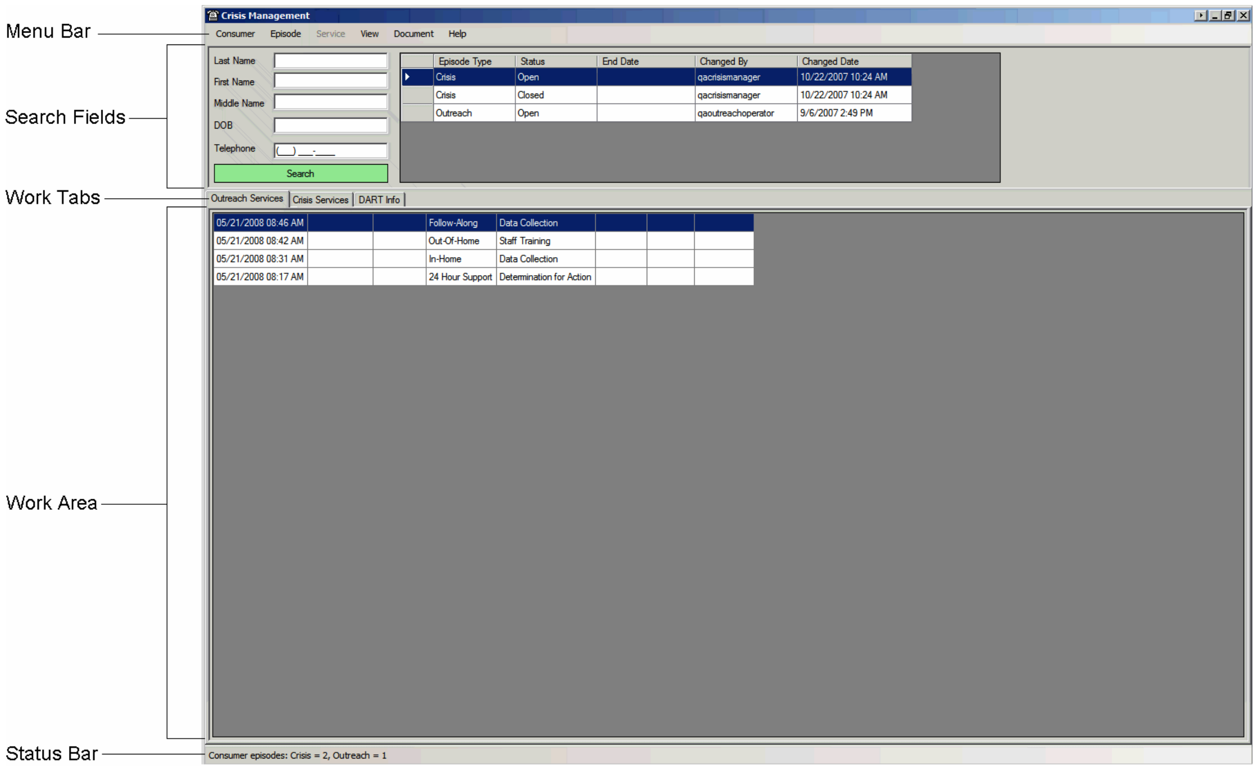
Example: Episode with Service Entries

A DD consumer in a group home begins hitting his housemates. A Crisis call is placed, and the clinician who receives the call starts a new episode in the CORM product and adds a service entry to document the call. She then visits the group home for evaluation, and adds another service entry to document her visit.

During the next two weeks, additional house visits are made and corrective actions are taken to alleviate the situation. Each person who performs a service for the consumer adds a service entry to the episode to document their action. After the DD consumer stops hitting people, the episode is closed in the CORM product.

4. The CORM Screen

After you log in, the CORM screen appears. The following illustration shows an example of the CORM screen, and calls out the major screen elements. (The graphic is a composite illustration for training purposes. Your screen will appear different):



CORM Screen Elements

Screen Element	Description
Menu bar	The menu bar contains menus that you can use to manage consumer and episode information in the CORM product. The menu labels and many menu items contain hot keys that you can use to quickly access a menu.
Search fields	Use the search fields to locate an existing consumer record or to start the process of adding a new consumer record to the system.
Work tabs	Use the work tabs to display Outreach, Crisis, or DART information.
Work area	The work area displays Outreach and Crisis service entries, and DART information for the consumer, according to the work tab that you select.
Status bar	The Status bar displays the number of current and previous Crisis and Outreach episodes that the consumer has had.

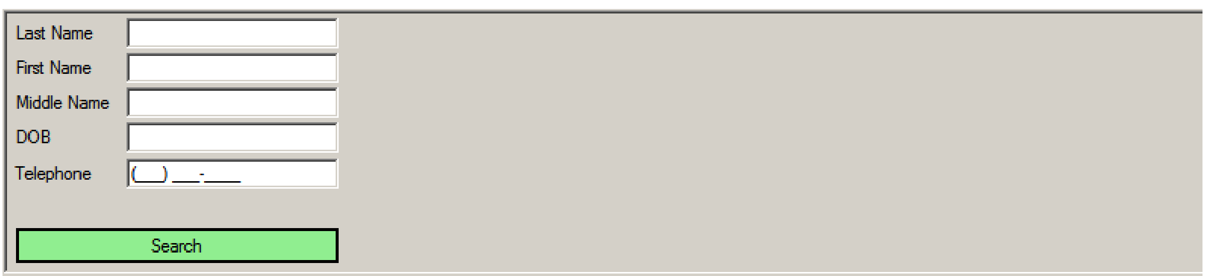
5. Working With a Crisis Consumer

The CORM product is controlled primarily through consumer access and episode access. This section describes how to use the CORM product to work with a Crisis consumer, and provides procedures that you can use to:

- Search for a consumer
- Add a consumer
- Identify and use the work area
- Add a service entry on a consumer
- Change a service entry on a consumer
- Use the Call Information window
- Use the Out-Of-Home window
- Use the Consumer Contacts window
- Run the Consumer Episodes report

5.1. Searching For a Consumer

You can use the search fields to search for a consumer or add a new consumer. The following illustration shows the search fields:



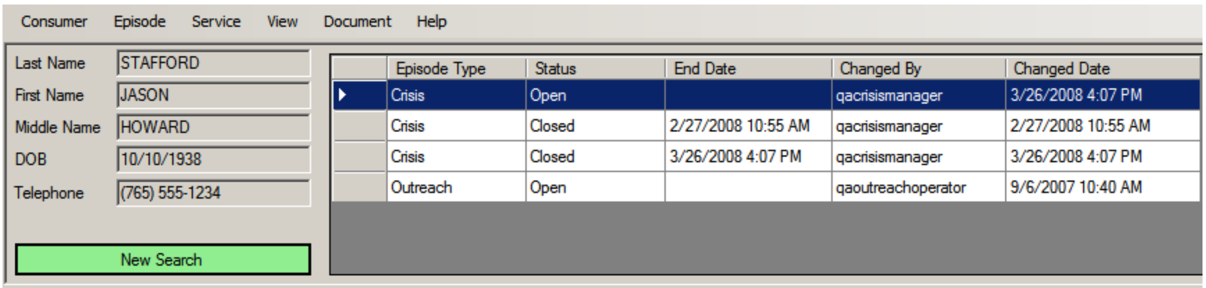
To search for a consumer, enter information into one or more of the search fields and select **Search**. The more information you provide, the more accurately the system can perform the search.

The system searches for a consumer based on the information that you enter, and one of the following events occurs:

- The system matches the search information to one consumer.
- The system matches the search information to multiple consumers.
- The system does not match the search information to a consumer and prompts you to add the consumer.

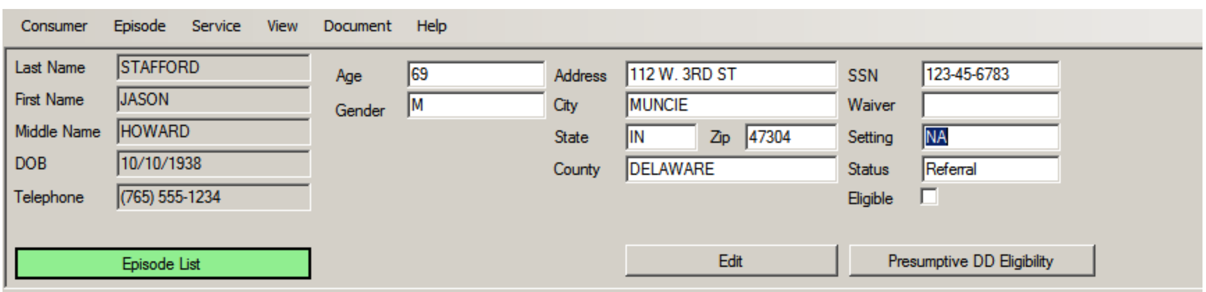
5.1.1 One Consumer Matches

When the system matches the search information to one consumer, the system displays the Crisis and Outreach episodes for the consumer. Both open and closed episodes appear, as shown in the following illustration:



Opening an Episode

You can open an episode for the current session type (for example, an Outreach episode while logged on as an Outreach user) that is in Open status by double-clicking on the record. When you open an episode, the **New Search** button changes to **Episode List** and additional consumer information appears to the right of the search fields, as shown in the following illustration:



While the additional fields that appear in this mode are read-only, the episode is open and you can add or change service entries. You can select the **Episode List** button to return to the list of episodes for the consumer. The **Presumptive DD Eligibility** button does not appear for an Outreach episode.

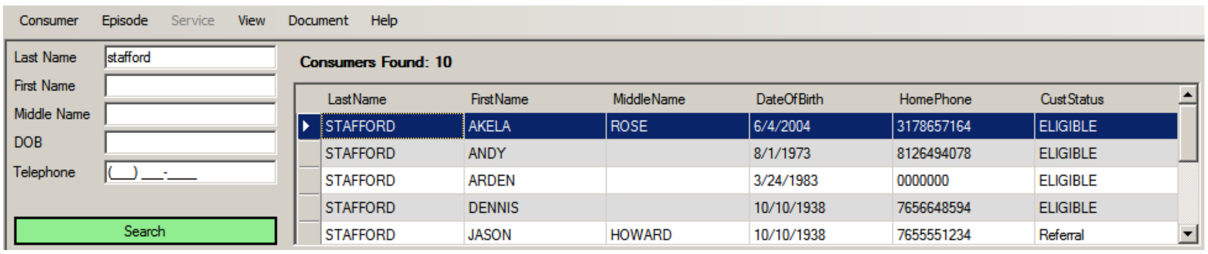
Viewing Closed and Opposite Session Type Episodes

You can view information about a closed episode or an episode for the opposite session (for example, an Outreach episode while logged on as a Crisis user) by clicking once on the episode in the list. The service entries for the episode appear in the work area, and you can use the **Service** menu to view the following additional information about the episode:

- Details
- Notes
- Reasons

5.1.2 Multiple Consumers Match

When the CORM product matches search information to multiple consumers in the system, the Consumers Found grid displays a list of the consumers and some of their demographic information, as shown in the following illustration:



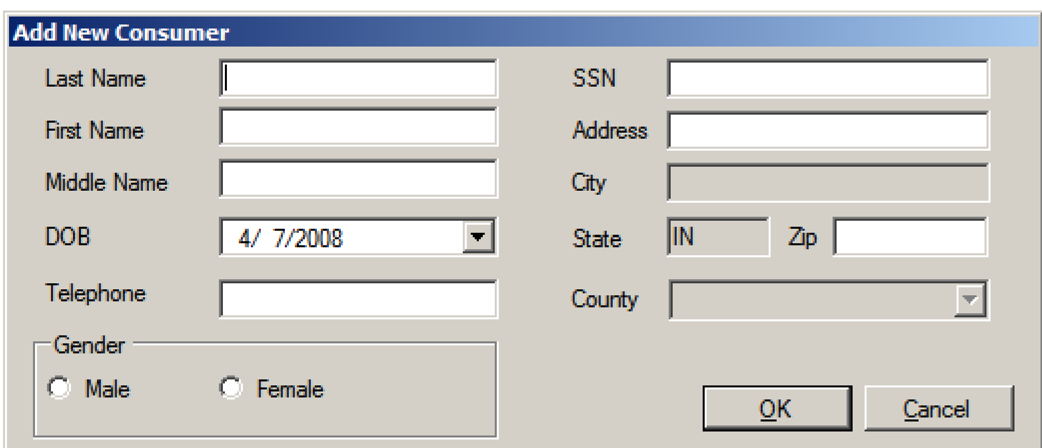
If you select a consumer with an open episode, the system displays the same information for the consumer as when the search yields a single match.

If you select a consumer that does not have an open episode, the system prompts you to open a new episode.

5.2. Adding a Consumer

When the CORM product does not match search information to a consumer in the system, the **Add New Consumer** window appears so that you can manually input demographic information for the new consumer.

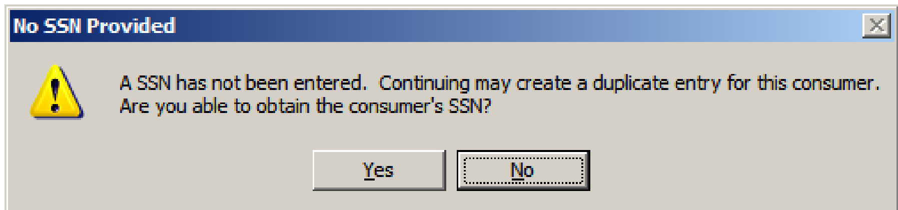
The following illustration shows an example of the **Add New Consumer** window:



Complete the information in the **Add New Consumer** window and select **OK**.

Important

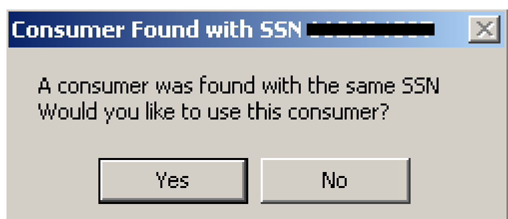
If you submit the **Add New Consumer** window without entering an SSN, the system displays the following message to help prevent the creation of a duplicate entry for the same consumer in the CORM product:



Select **Yes** to return to the **Add New Consumer** window so that you can enter an SSN.

Select **No** to skip this step and submit the information to the CORM product.

If the **SSN** Field contains a number that matches an existing SSN when you submit the **Add New Consumer** window, the system displays the following message to help prevent the creation of a duplicate entry for the same consumer in the CORM product:



Select **Yes** to use the identified consumer.

Select **No** to return to the **Add New Consumer** window so that you can enter a different SSN.

After you complete the information in the **Add New Consumer** window, the system adds the information to the demographic fields in the search area and displays the following prompt:

This consumer does not have any episodes. Would you like to open a new one?

Select **Yes** to open a new episode for the consumer.

By default, the system selects one of the following service types and then displays the Select a Service Description window:

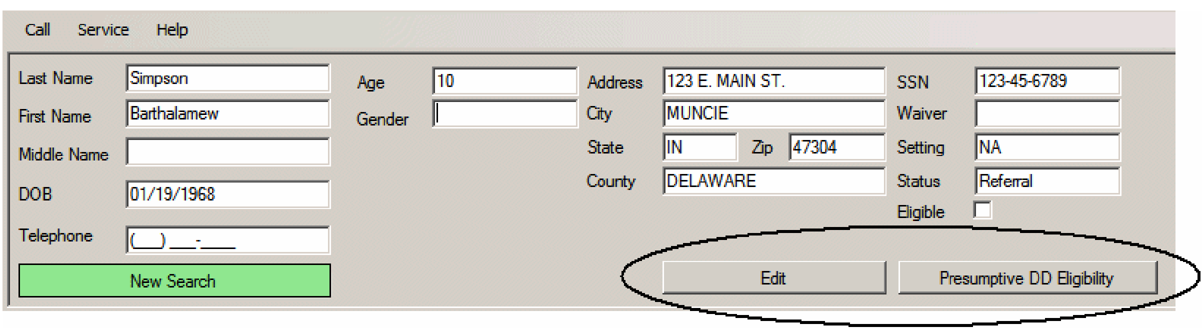
- **24 Hour Support** for a Crisis episode.
- **Admin Support** for an Outreach episode.

Select a description for the new service entry or select the **Cancel** button in the **Select a Service Description** window (you can complete the information in this window later). One of the following events occurs:

- The Call Information window appears for a new Crisis episode, regardless of the service description that you choose. Complete the information in the **Call Information** window or select the **Cancel** button (you can complete the information in this window later).

- The Outreach Details window appears for a new Outreach episode when you accept the default **Referral** service description. Complete the information in the Outreach Details window or select the **Cancel** button (you can complete the information in this window later).

The **Edit** button and **Presumptive DD Eligibility** button appear in the search area for a new Crisis consumer, as shown in the following illustration:



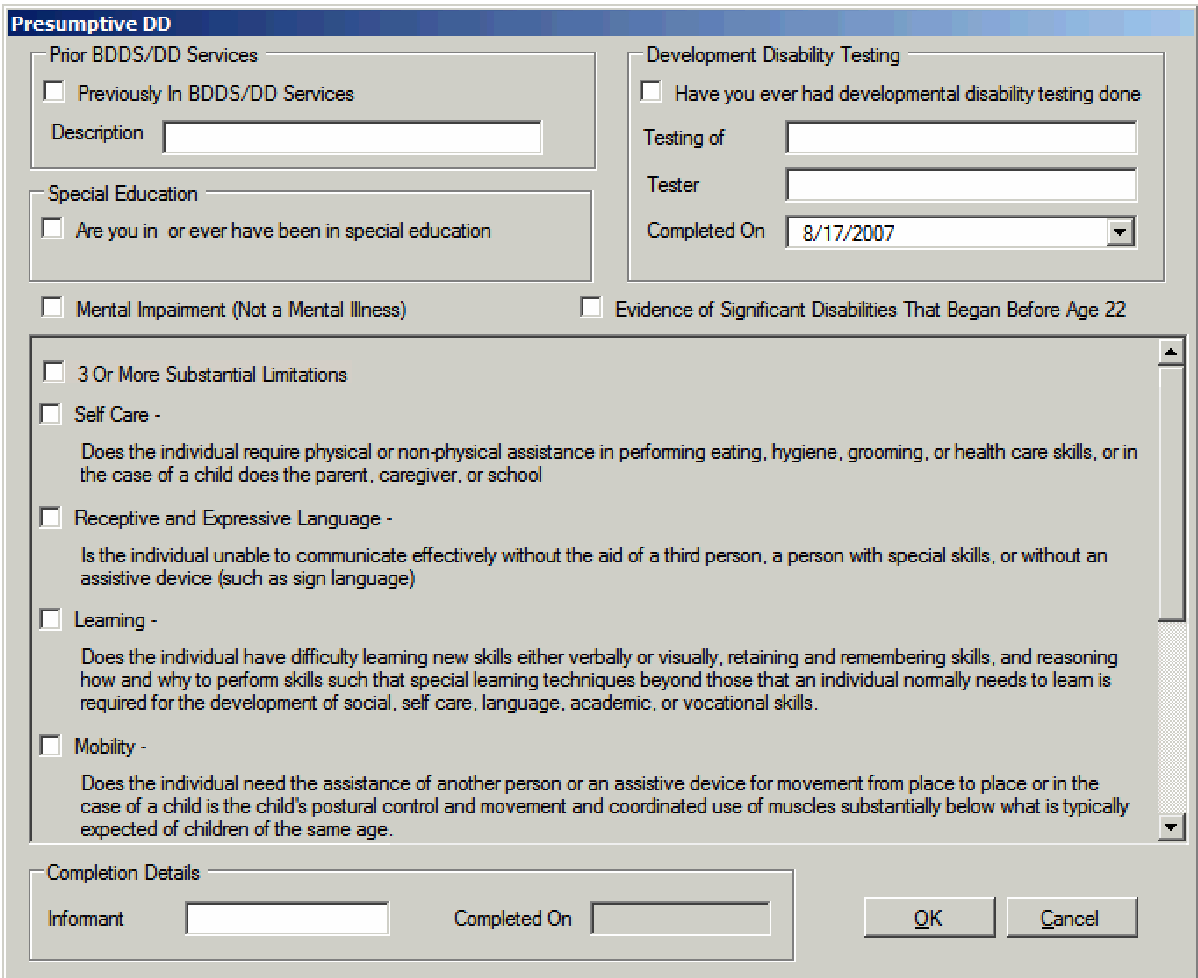
Important

The **Presumptive DD Eligibility** button also appears when you select an open Crisis episode with a status other than Eligible or Ineligible.

The **Presumptive DD Eligibility** button does NOT appear for an Outreach episode.

Select the **Edit** button to display the **Edit Consumer** window, which you can use to add or change information about a Crisis or Outreach consumer.

Select the **Presumptive DD Eligibility** button to display the **Presumptive DD** window, shown in the following illustration, which you can use to perform a preliminary determination of a new Crisis consumer's eligibility for services:

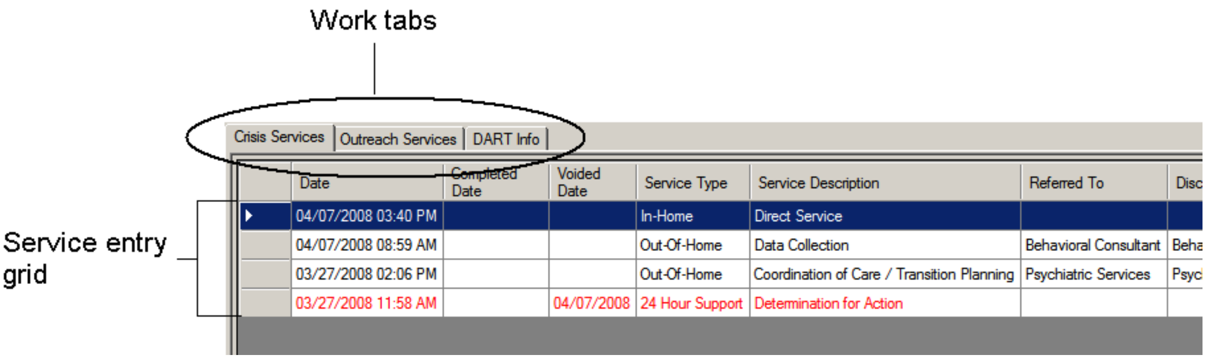


5.3. The Work Area

After you open an episode for a consumer, the work area on the CORM screen displays the:

- Work tabs
- Service entry grid

The following partial illustration shows an example of the work tabs and service entry grid:



5.3.1 Work Tabs

Work tabs provide fields that you can use to manage an episode. The CORM product displays the following tabs in the work area:

- **Crisis Services**
- **Outreach Services**
- **DART Info**

The usability of the **Crisis Services** tab and **Outreach Services** tab is determined during login by your role. For example, if you log in as a Crisis user:

- The **Crisis Services** tab appears by default when you open an episode.
- You can enter or change information for Crisis episodes.
- The **Outreach Services** tab presents read-only information.

If you log in as an Outreach user:

- The **Outreach Services** tab appears by default when you open an episode.
- You can enter or change information for Outreach episodes.
- The **Crisis Services** tab presents read-only information.

The **DART Info** tab is available for both Crisis and Outreach users, and always presents read-only information.

See Also

For more information about the **DART Info** tab, refer to Appendix B: DART Information Screens.

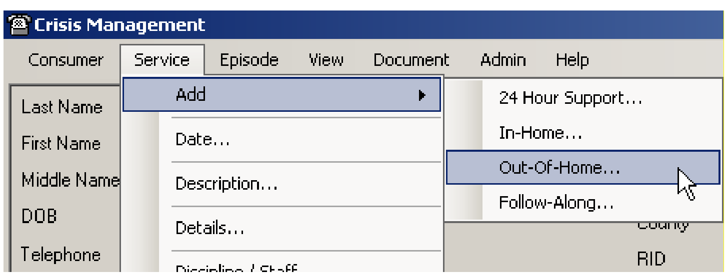
5.3.2 The Service Entry Grid

The service entry grid displays the service entries for the episode. Service entries contain detailed information about a service that a user provided to the consumer. The system automatically adds a new service entry when you open a new episode. You can also add a service entry manually.

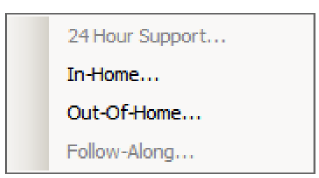
The service entry grid displays multiple service entries by date in descending order. You must select a service entry to add or change information. A selected service entry appears with a solid color and a white arrow in the left column, as shown in the illustration on the previous page.

5.4. Adding a Service Entry

After you open an episode for a new or existing consumer, you can add one or more service entries. To add a service entry for an episode, open the **Service** menu, point to **Add**, and then select a service type from the pull-down menu, as shown in the following illustration:



The availability of the service types on the pull-down menu varies according to the latest service type selected. For example, if the consumer is in a **24 Hour Support** service type, you can select **24 Hour Support** or any of the other service types. If you add an **In-Home** service type, the system limits you to selecting another **In-Home** or an **Out-Of-Home** service type, as shown in the following illustration:



The following table defines the service types available:

Service Type Availability

With This Service Type Selected	You Can Add One of These Service Types
24 Hour Support	24 Hour Support In-Home Out-Of-Home Follow-Along
In-Home	In-Home Out-Of-Home
Out-Of-Home	Out-Of-Home Follow-Along
Follow-Along	Out-Of-Home Follow-Along

5.4.1 Product/Interventions Window

After you select a service type, the **Product/Interventions** window appears, as shown in the following illustration:

[Graphic]

Select one product for the service and one or more interventions to complete this window. The list of interventions changes according to the product that you select.

5.4.2 Communication Window

The **Communication** window appears after you complete the **Product / Interventions** window. You use the **Communication** window to indicate the types of communication used for the service. You can select multiple communication types, as shown in the following illustration:

[Graphic]

5.4.3 Location Details Windows

After you complete the **Communication** window, one of the following windows appears:

- **In-Home Off-Site Location Details** if the service type is In-Home Off-Site
- **Out-of-Home Location Details** if the service type is Out-Of-Home

- **Outcome Measures** if the service type is other than In-Home Off-Site or Out-Of-Home

The following illustration shows an example of the **In-Home Off-Site Location Details** window:

[Graphic]

You use this window to indicate where the consumer was when the service was administered.

The following illustration shows an example of the **Out-of-Home Location Details** window:

[Graphic]

You use this window to indicate who approved the Out-of-Home placement and provide basic information about the placement facility.

5.4.4 Outcome Measures Window

The **Outcome Measures** window appears after you complete the previous windows. You use this window to indicate the outcome of a service. You can select one or more outcomes, as shown in the following illustration:

[Graphic]

5.4.5 Service Notes Window

The Service Notes window appears after you complete the **Outcome Measures Window** so that you can quickly add a note to the service.

5.4.6 Service Time Management Window

After you add a note or cancel the **Service Notes** window, the system displays the **Service Time Management** window. You use this window to record the date and time of the service provided. For service types tied to contractual recording (for example, the first In-Home service added for a consumer), the **Service Time Management** window includes fields for the response time of the service. A **Justification** field becomes active (and required) if the response time falls outside of the contractual timeframe. The following illustration shows an example of the **Service Time Management** window for contractual recording:

[Graphic]

5.4.7 Trends Window

The Trends window is the last window to automatically appear in sequence when you add a new service. You can use this window to indicate one or more trends that have been recognized for the consumer, as shown in the following illustration:

[Graphic]

5.5. Changing a Service Entry

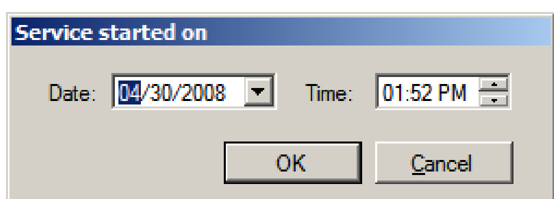
After you add a service entry to an episode, you can use the **Service** menu to also change or add information to the service entry row in the work area.

Tip

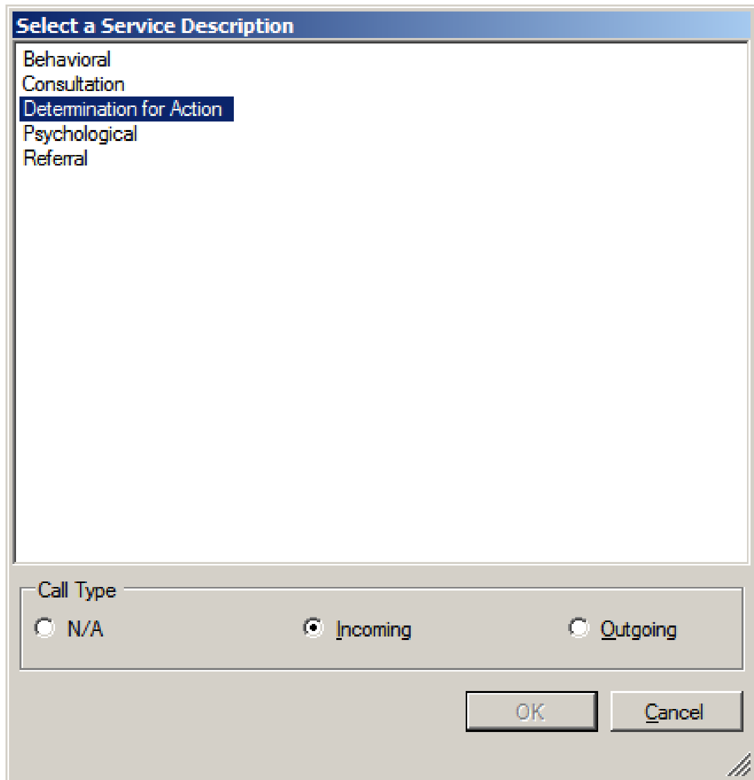
You are not required to change a service entry immediately after you add it. You can select the **New Search** button to return to the search fields and perform another search. You can change a service entry at any time.

The following table describes the **Service** menu items that you can use to change a service entry.

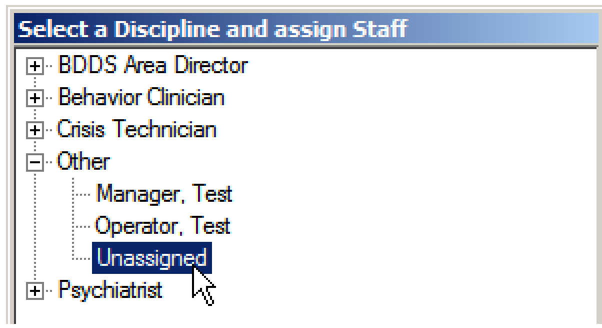
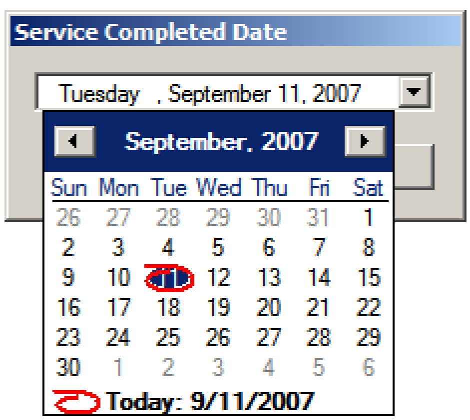
Service Menu Items

Item	Description
Date…	Displays the **Service Date** window, which you can use to change the beginning date and time of the service to any current or past date and time combination. The following illustration shows an example of the **Service Date** window: 

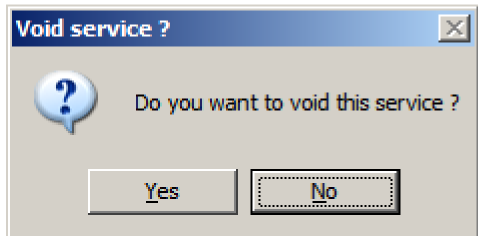
Service Menu Items (continued)

Item	Description
Description…	Displays the **Select A Service Description** window that you can use to select the desired service description. The following illustration shows an example of the **Select A Service Description** window:  You can also use the radio buttons in the Call Type section at the bottom of the window to indicate whether the service is related to a phone call.
Details…	Displays the Call Information or Out-Of-Home window, depending on the service type you selected when you added the service. If you selected a **24-Hour Support** service type, the **Call Information** window appears. If you selected an **Out-of-Home** service type, the **Out-Of-Home** window appears. A window does not appear if you select the **Details** menu item for an **In-Home** or **Follow-Along** service type.

Service Menu Items (continued)

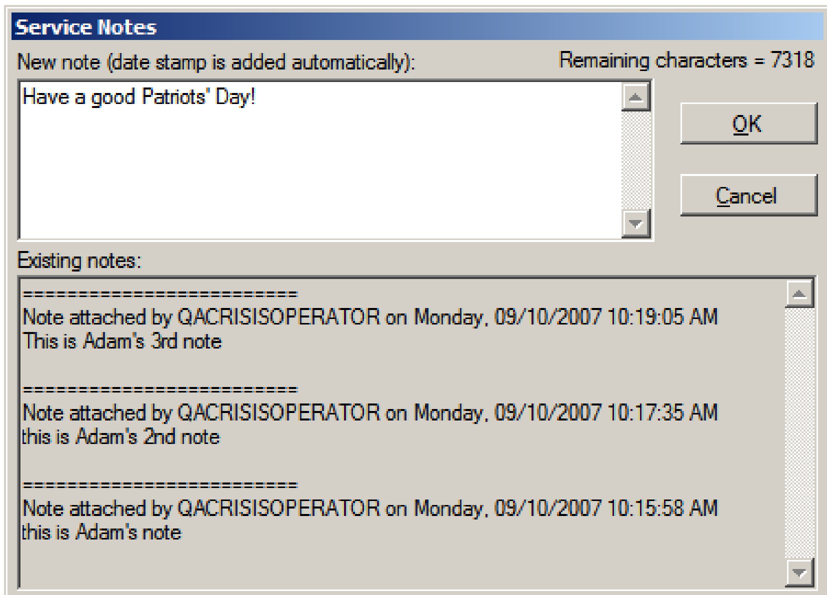
Item	Description
Discipline / Staff…	Displays the **Select a Discipline and assign Staff** window that you can use to assign a staff member to the service. A decision tree appears when you select a discipline, branching out to display the staff names available for the discipline you select. The following partial illustration shows an example of the **Select a Discipline and assign Staff** window: 
Mark as Completed	Displays the Service Completed Date window, which you can use to mark a selected service entry as complete. Clicking the drop-down arrow displays the calendar, as shown in the following illustration:  You can use the calendar to search for a year, month, and day. You can select past and future dates. After you select a date, the date appears in the **Completed Date** column.

Service Menu Items (continued)

Item	Description
Remove Completed Date (manager function)	Removes the completed status on a selected service entry in the work area. (You must log in as a manager or director to perform this action.)
Mark as Voided	Voids a selected service entry in the work area when you select **Yes** at the following prompt:  A voided entry displays a different color of text (red text if your PC uses the default Microsoft color scheme) than non-voided entries.
Remove Voided Date (manager function)	Removes the void status on a selected service entry in the work area. (You must log in as a manager or director to perform this action.)

Service Menu Items (continued)

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>Notes…</td><td>
Displays the Service Notes window that you can use to view and add service notes (you can also double-click a service entry row to display the Notes window). The system displays the notes by date in descending order (newest note first), as shown in the following illustration:



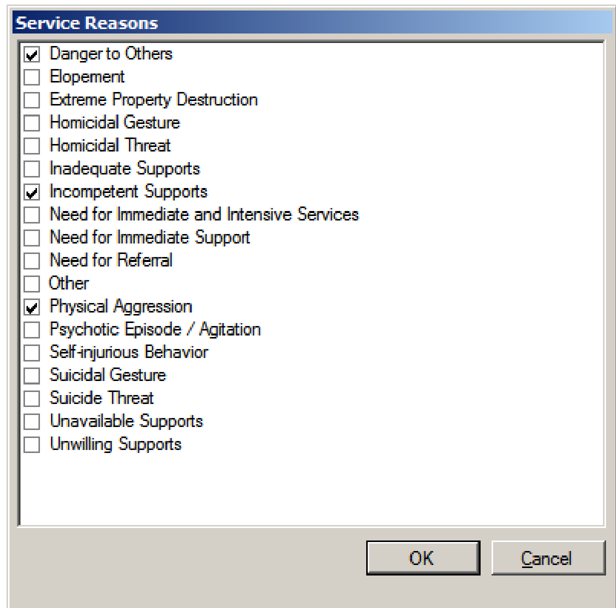
To add a note, enter the note in the list box under Enter new note (date stamp is added automatically). You can also paste copied text from Microsoft Word into the list box. The system date-stamps and time-stamps the note and adds the note to the Existing notes area of the window.

The Remaining characters field in the upper right corner decreases as you type or when you paste information, indicating the number of characters that remain from the 8,000-character limit that exists for the service. The field only shows 7,900 characters to compensate for the date stamp text. When the number of remaining characters falls below 100, the Remaining characters field turns red.

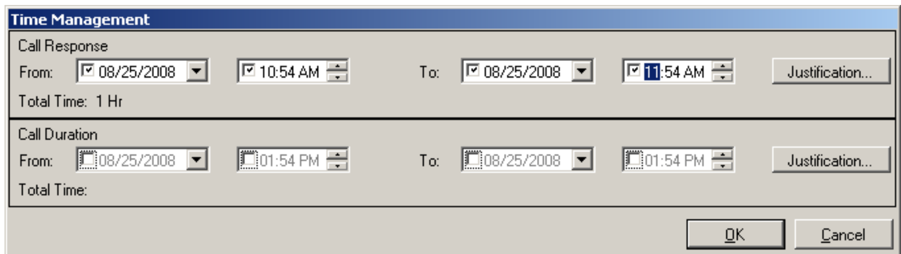
When you reach the 8,000 character limit (or exceed the limit by pasting a note), the following message appears:

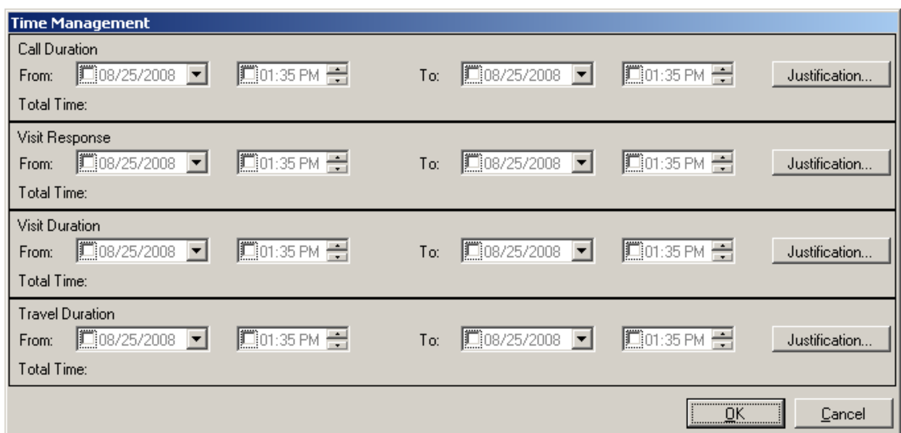
You have entered or exceeded the maximum length of this note. Text may have been truncated beyond the maximum length of approximately 8000 characters.
</td></tr>
</table>

Service Menu Items (continued)

Item	Description
Reasons…	Displays the **Service Reasons** window so that you can select or unselect one or more reasons for the service requested for the episode. The following illustration shows an example of the **Service Reasons** window: 
Referred To…	Displays the **Service Referred To** window that you can use to indicate a referral service used. Select one of the following valid entries from the list: **<u>Crisis Services</u>** **Adult Protective Services** **BDDS** **Behavioral Consultant** **Day Services** **IU Medical Center** **Mental Health Center** **Neurology** **Occupational Therapy** **Other** **Outreach** **Physical Therapy** **Psychiatric Services** **Respite** **Riley Outpatient Clinic** **Social Organization** **Special Olympics** **Speech-Language** **Therapist/Counselor** **<u>Outreach Services</u>** **211 Services** **911 Emergency** **Adult Protective Services** **APS** **BDDS** **BQIS** **Clinical Provider** **CMHC** **CPS** **Crisis** **Day Provider** **ER of Hospital** **Family/Self** **IDT** **IPMG/Case Manager** **IU Medical Center** **Other** **Residential Provider** **Riley Outpatient Clinic** **Risk Management** **Training**

Service Menu Items (continued)

<table>
<tr><th>Item</th><th>Description</th></tr>
<tr><td>Time Management…
(Crisis episodes only)</td><td>
Displays the Time Management window that you can use to record response times and durations.
The size of the Time Management window varies according to the service type. For example, the following illustration shows an example of the Time Management window for a 24-Hour Support service type:


The following illustration shows an example of the Time Management window for In-Home, Out-Of-Home, and Follow-Along service types:


To change a date, select the check box in the field and search for the date in the drop-down calendar. You can use the calendar to search for a year, month, and day.
To change a time, select the check box in the field and then select either the hour, minutes, or AM/PM indicator to activate the up and down arrows within the field. The up arrow increases the value, while the down arrow decreases the value.
Select Justification to display the Justification window that you can use to explain a situation (for example, why a call response was so late or why the duration of a visit was exceedingly long).
</td></tr>
</table>

5.6. The Call Information Window

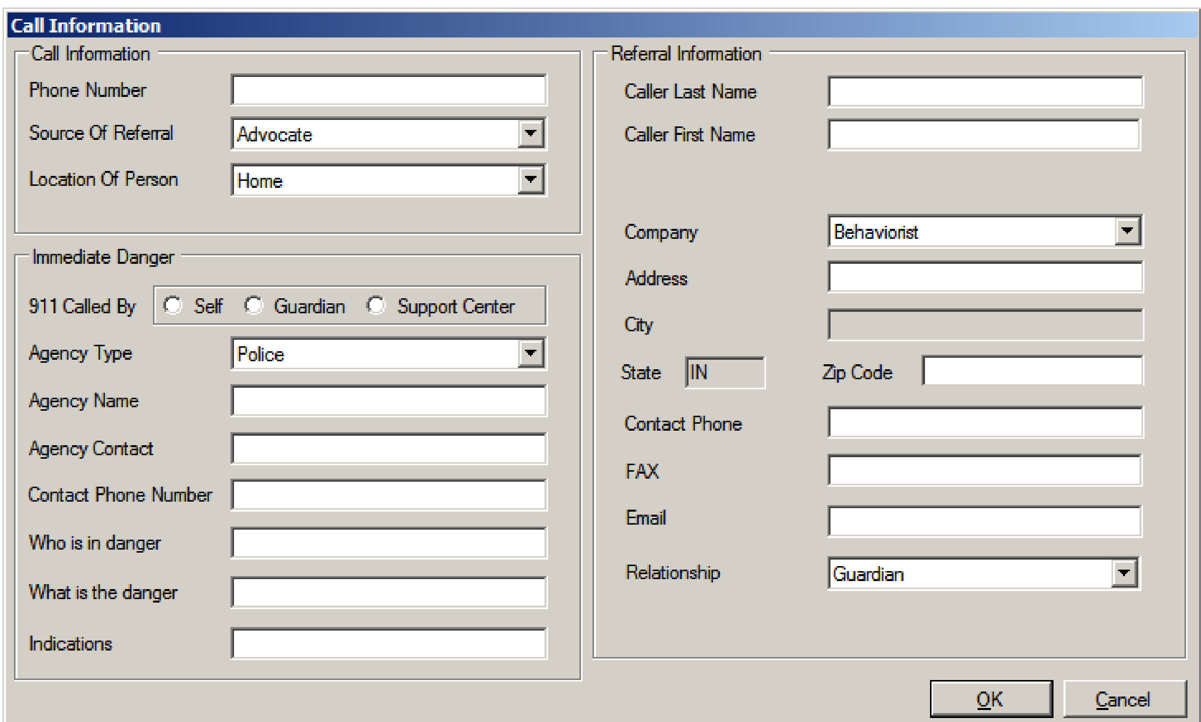
The **Call Information** window contains fields that you can use to document the demographic, referral, and emergency information from a Crisis call. The **Call Information** window appears when you:

- Open a new episode for a consumer.
- Select **Details** from the **Service** menu for a **24 Hour Support** service entry.

The **Call Information** window is divided into the following sections that group the fields logically:

- **Call Information**
- **Immediate Danger**
- **Referral Information**

The following illustration shows an example of the **Call Information** window:

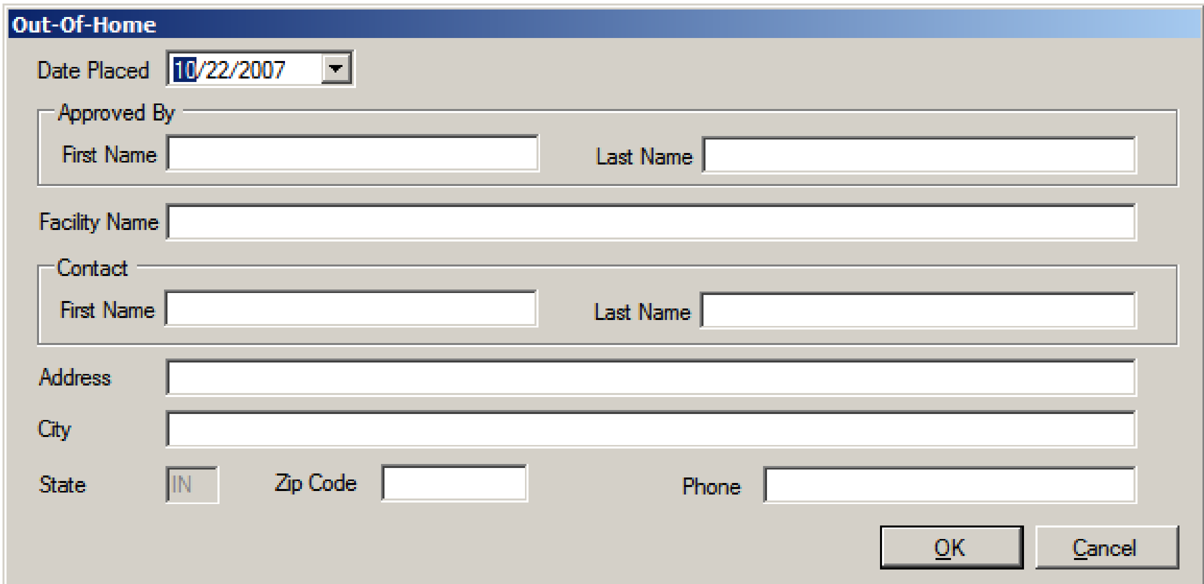


See Also

Refer to Appendix A: Call Information Window Fields for descriptions of the fields in the **Call Information** window.

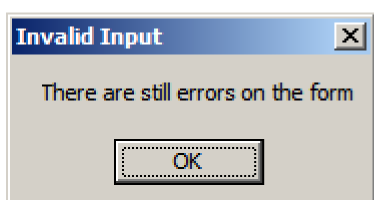
5.7. The Out-Of-Home Window

The **Out-Of-Home** window contains fields that you can use to document information about an out-of-home placement for the consumer. The **Out-Of-Home** window appears when you select **Details** from the **Service** menu for an **Out-Of-Home** service entry. The following illustration shows an example of the **Out-Of-Home** window:



Important

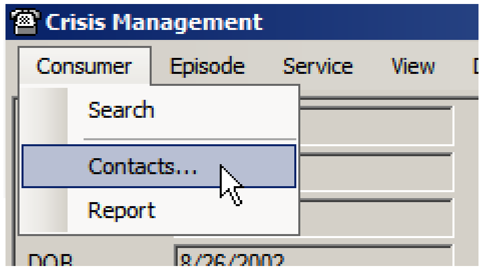
When you use the **Out-Of-Home** window, you must complete all of the fields in the window. If you attempt to save a partially completed window, the system highlights each empty field with an exclamation symbol and displays the following error message:



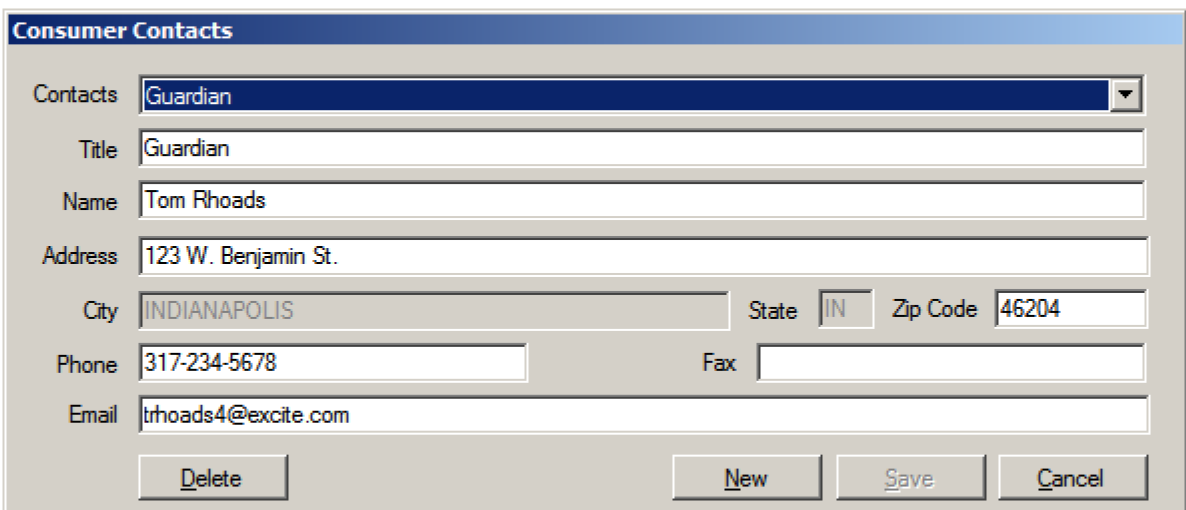
Select **OK** to remove the error message, and then complete the remaining fields in the window.

5.8. The Consumer Contacts Window

You can use the **Consumer Contacts** window to create one or more contacts for a consumer. To display the **Consumer Contacts** window, select **Contacts** from the **Consumer** menu, as shown in the following illustration:



The following illustration shows an example of the **Consumer Contacts** window:



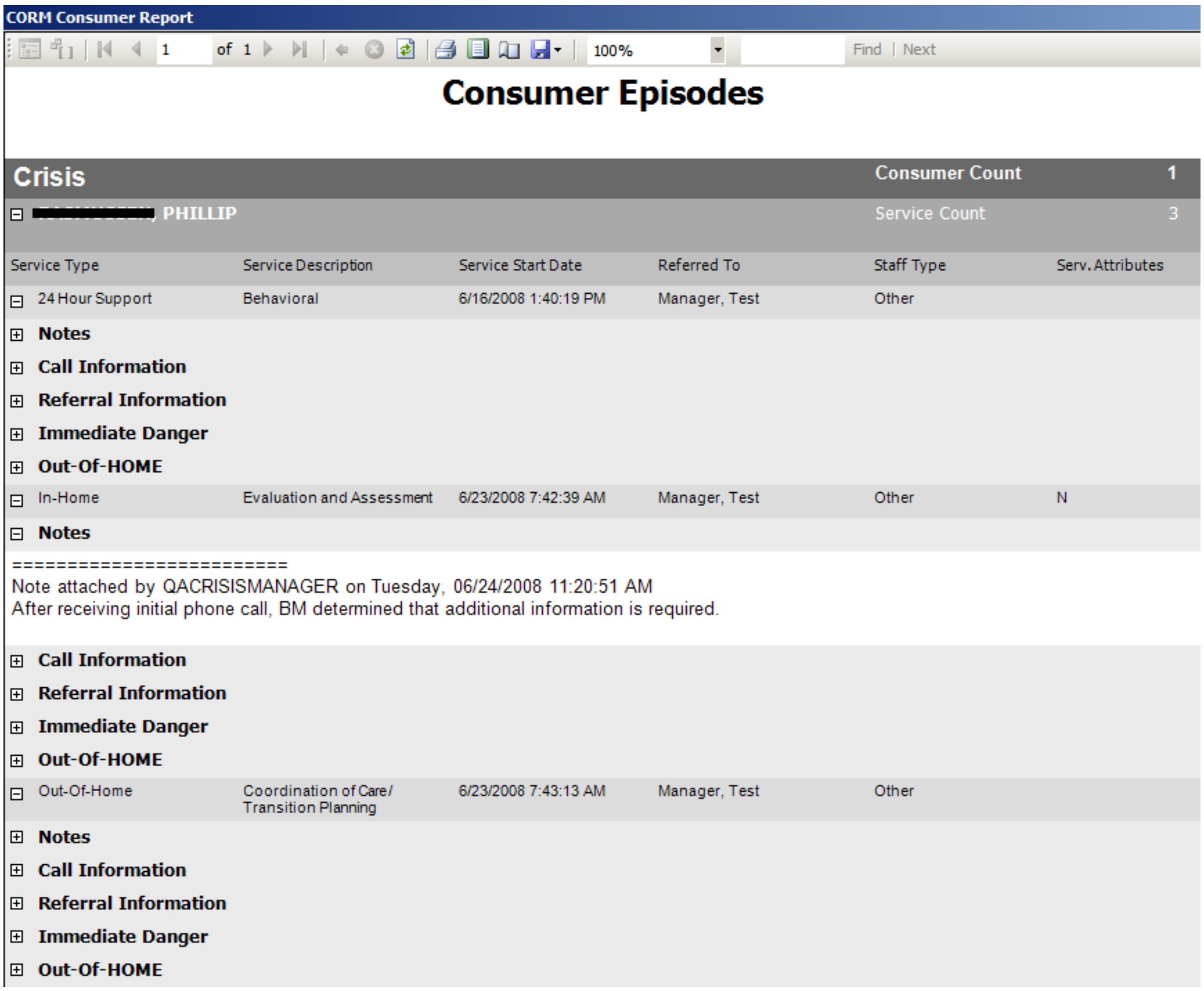
The **City** and **State** fields in the **Consumer Contacts** window are read-only. The system automatically populates these fields when you enter a postal code in the **Zip Code** field and press the **TAB** key or select another field with the mouse pointer.

After you complete and save the information in the **Consumer Contacts** window, the system applies the contact to the consumer (not to the episode). Deleting or closing an episode for a consumer does not delete a consumer contact. To delete a consumer contact, you must use the **Delete** button in the **Consumer Contacts** window.

5.9. The Consumer Episodes Report

The **Consumer Episodes** report contains detailed service information about the currently displayed consumer. You can expand or contract sections of the report to show or hide information.

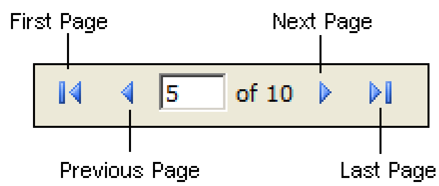
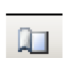
To run the **Consumer Episodes** report, select **Report** from the **Consumer** menu. The following illustration shows an example of the **Consumer Episodes** report with several sections expanded, including the **Notes** section for the **In-Home** service:



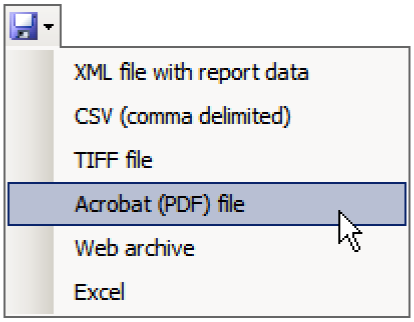
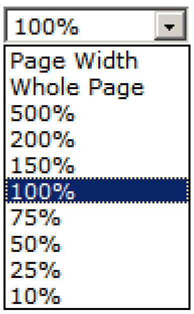
5.10. The Report Toolbar

Some of the icons and buttons on the **Consumer Episodes** report toolbar become active by default when you run the report. The following table explains the toolbar icons and buttons that you can use in the **Consumer Episodes** report:

Toolbar Icons and Buttons

Icon or Button	Description
Page navigation 	Use these buttons to move from page to page in the report. You can select one of the identified buttons to move to that page, or enter the page number in the window and press **ENTER**.
Refresh 	Use this icon to reset the report to the first page.
Print 	Use this icon to print a copy of the report.
Print Layout 	Use this icon to display the report in print preview mode.
Page Setup 	Use this icon to display the **Page Setup** window that you can use to change the following parameters of the report: • Paper size and source • Orientation (for example, Portrait or Landscape) • Margins • Printer and printer properties

Toolbar Icons and Buttons (continued)

Icon or Button	Description
Export 	Use this icon to save the report as a file in a different format. For example, to create a PDF file for better viewing and printing, select Acrobat (PDF) file. The system displays the Save As dialog box that you can use to navigate to the desired folder.
Zoom field 	Use the zoom field to select the viewing size of the report. The system defaults to 100%. Select a higher value to increase the size of the report, or a lower value to decrease the size of the report. You can also select **Whole Page** to view the entire report on your screen, or **Page Width** to set the zoom factor according to the width of the report.

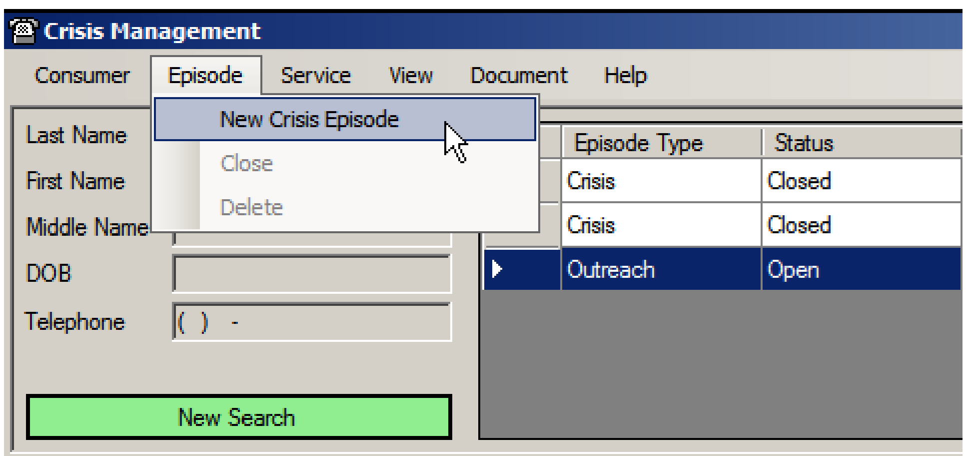
6. Working with Episodes

This section describes how to view, access, and control episodes in the CORM product, and provides procedures that you can use to:

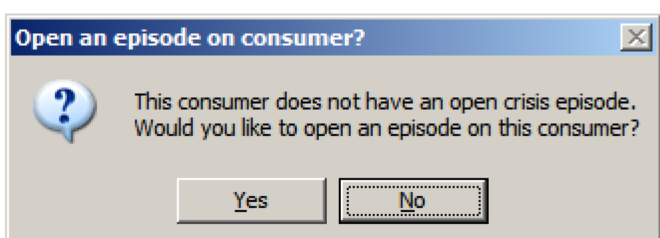
- Open a new episode for a consumer
- Close an episode (manager function)
- Delete an episode (manager function)
- View the open episodes on the system
- View the closed episodes on the system
- View previously displayed consumer records
- Attach (upload) a document to an episode
- View (download) a document on an episode

6.1. Opening a New Episode for a Consumer

You can open a new episode for a consumer if a current episode does not exist for the consumer. To open a new episode, select the **Episode > New Crisis Episode** menu, as shown in the following illustration:



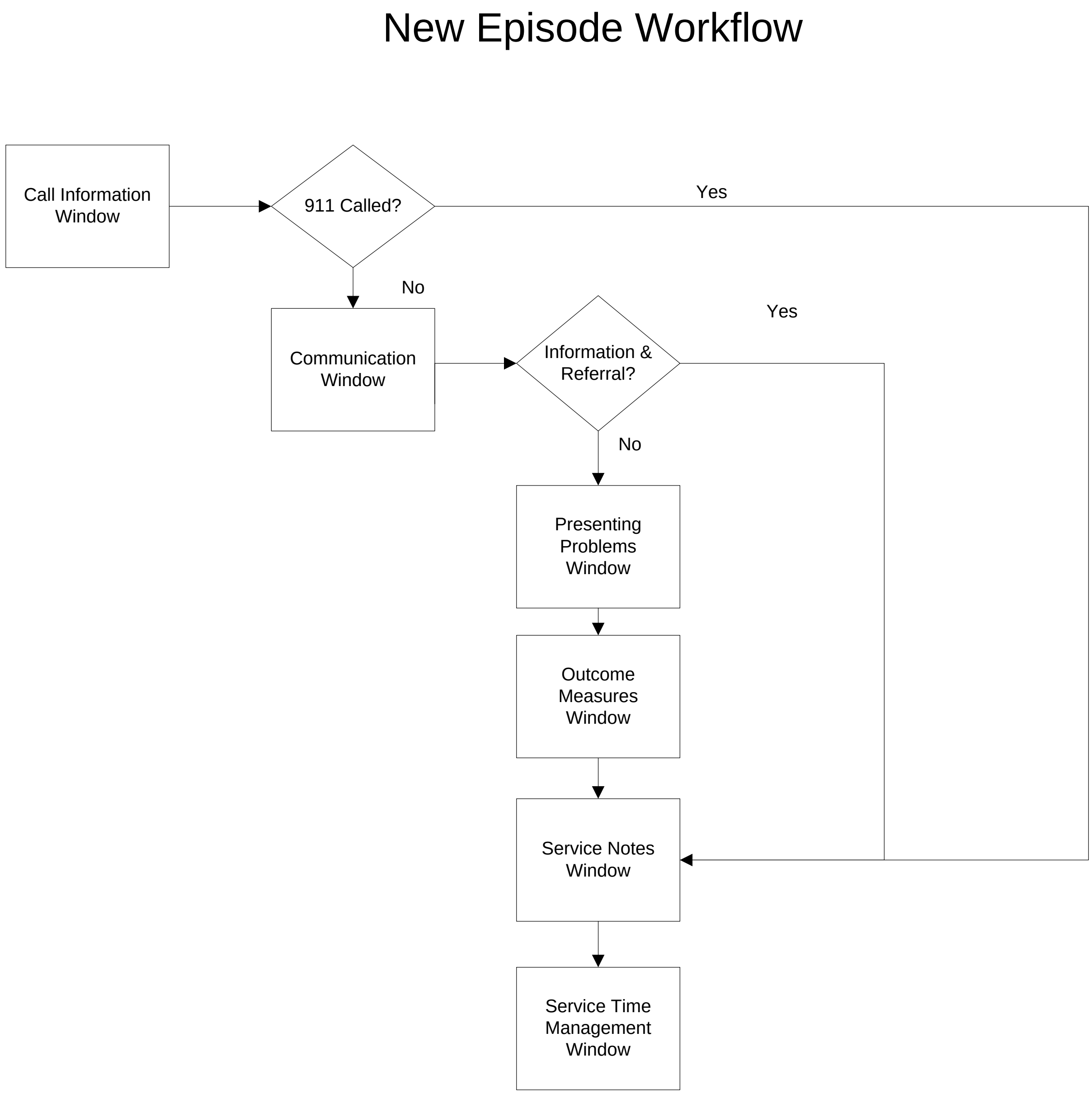
The following prompt appears:



Select **Yes** to open an episode for the consumer.

6.1.1 New Episode Workflow

The following illustration shows the workflow that occurs when you open a new episode for a consumer.



6.1.2 Call Information Window

When you open a new episode, the system selects the **24 Hour Support** service type and displays the Call Information window by default. Complete as much information in the **Call Information** window as possible.

Important

The following fields from the **Call Information** section of the **Call Information** window are required before you can move to the next window (you can complete the remaining fields in the window later):

- **Caller Last Name**
- **Caller First Name**
- **Phone Number**
- **Initial Residential Setting**

6.1.3 911 Called By Section

If you complete the **911 Called By** section of the **Call Information** window, the system automatically displays the Service Notes window.

If you do not complete the **911 Called By** section of the **Call Information** window, the **Communication** window appears.

6.1.4 Communication Window

You use the **Communication** window to indicate the types of communication used for the service. You can select multiple communication types, as shown in the following illustration:

[Graphic]

Information and Referral

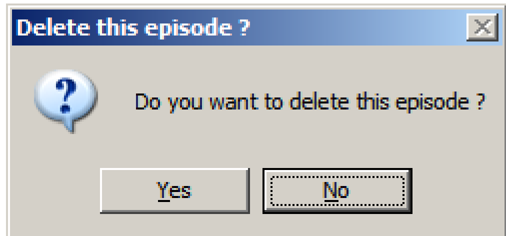
6.2. Closing an Episode (Manager Function)

If you possess the Manager or Director role in the CORM product, you can close an open episode by selecting **Close** from the **Episode** menu. The system prompts you to choose a date and time for the closure, as shown in the following illustration:

Select the date and time on which the episode was officially closed and select **OK**.

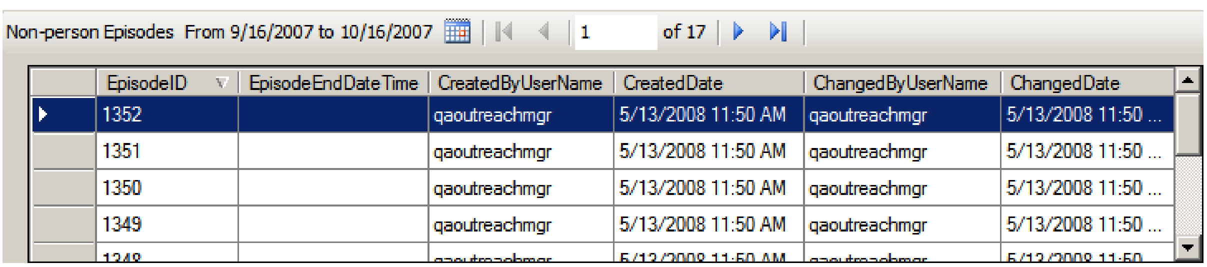
6.3. Deleting an Episode (Manager Function)

If you possess the Manager or Director role in the CRISIS product, you can delete an open episode by selecting **Delete** from the **Episode** menu. Select **Yes** at the following prompt:



6.4. Viewing the Non-Person Episodes on the System (Outreach Episodes only)

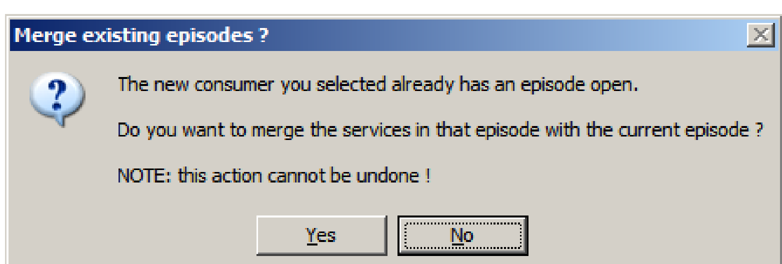
You can view the non-person episodes on the system by selecting **Non Person** from the **View** menu. The system displays the non-person episodes for the last 30 days in the Non-person Episodes grid, as shown in the following illustration. You can change the date range in this episode grid.



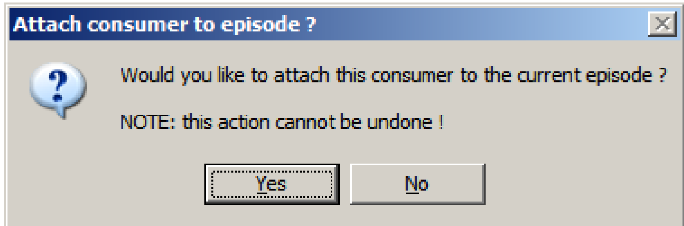
To attach a non-person episode to a consumer:

1. Double-click on the episode in the grid. The system displays the selected episode and removes any previous consumer information.

2. Use the search fields to display a consumer. If the consumer has an open episode, the following message appears:



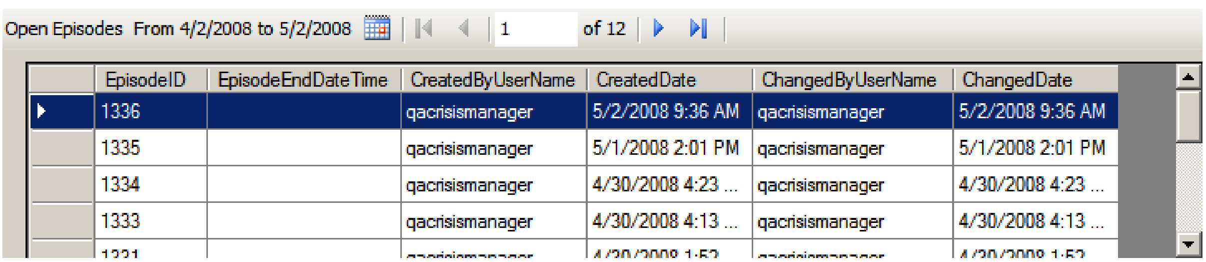
If the consumer does not have an open episode, the following message appears:



3. Select **Yes** to merge the services or attach the consumer to the episode.

6.5. Viewing the Open Episodes on the System

You can view the open CRISIS episodes on the system by selecting **All Open** from the **View** menu. The system displays the open episodes for the last 30 days in the Open Episodes grid, as shown in the following illustration. You can change the date range in this episode grid.



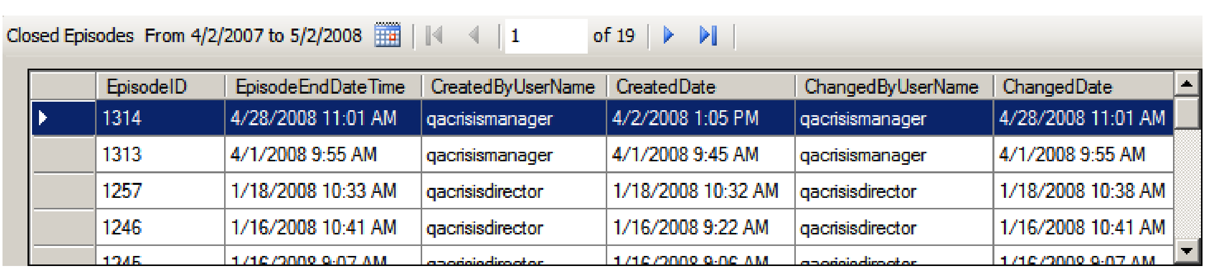
Open Episodes From 4/2/2008 to 5/2/2008 | 1 of 12

EpisodeID	EpisodeEndDateTime	CreatedByUserName	CreatedDate	ChangedByUserName	ChangedDate
1336		qacrisismanager	5/2/2008 9:36 AM	qacrisismanager	5/2/2008 9:36 AM
1335		qacrisismanager	5/1/2008 2:01 PM	qacrisismanager	5/1/2008 2:01 PM
1334		qacrisismanager	4/30/2008 4:23 ...	qacrisismanager	4/30/2008 4:23 ...
1333		qacrisismanager	4/30/2008 4:13 ...	qacrisismanager	4/30/2008 4:13 ...

If you click on an episode record, the system displays the service entry information for that episode. If you double-click on an episode record, the system opens that episode and you can add or change service entry information.

6.6. Viewing the Closed Episodes on the System

You can view the closed CRISIS episodes on the system by selecting **All Closed** from the **View** menu. The system displays the closed episodes for the last 30 days in the Closed Episodes grid, as shown in the following illustration. You can change the date range in this episode grid.



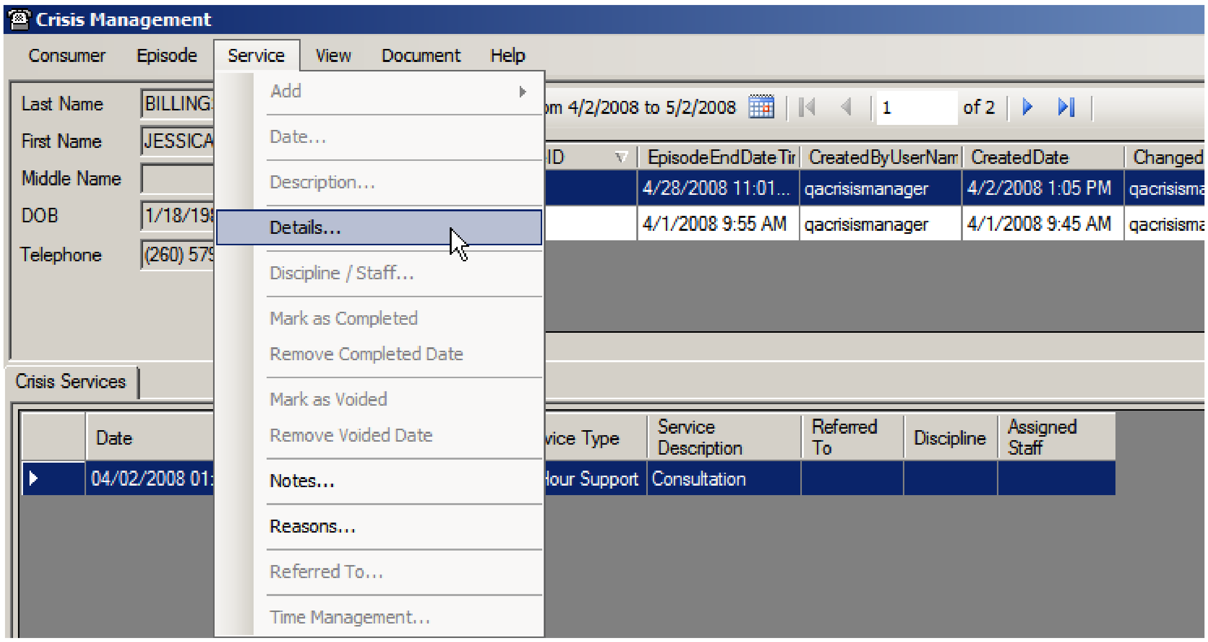
Closed Episodes From 4/2/2007 to 5/2/2008 | 1 of 19

EpisodeID	EpisodeEndDateTime	CreatedByUserName	CreatedDate	ChangedByUserName	ChangedDate
1314	4/28/2008 11:01 AM	qacrisismanager	4/2/2008 1:05 PM	qacrisismanager	4/28/2008 11:01 AM
1313	4/1/2008 9:55 AM	qacrisismanager	4/1/2008 9:45 AM	qacrisismanager	4/1/2008 9:55 AM
1257	1/18/2008 10:33 AM	qacrisisdirector	1/18/2008 10:32 AM	qacrisisdirector	1/18/2008 10:38 AM
1246	1/16/2008 10:41 AM	qacrisisdirector	1/16/2008 9:22 AM	qacrisisdirector	1/16/2008 10:41 AM

When you click on a closed episode record, the system displays the service entries for that episode and the following **Service** menu items become available:

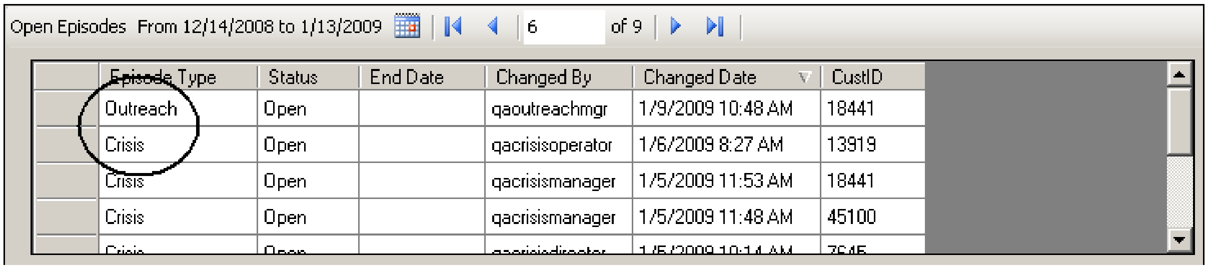
- Details
- Notes
- Reasons

The following illustration shows an example of the **Service** menu for a closed episode:

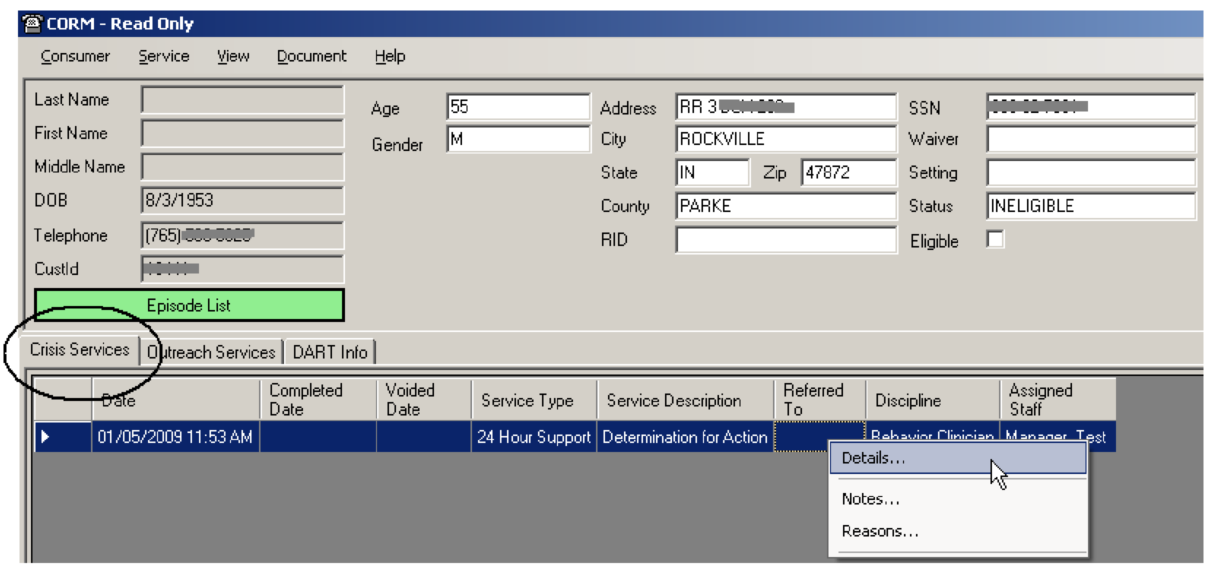


6.7. Viewing Episodes as a Read-Only User

If you are assigned the Read-Only user role, the system displays both Outreach and Crisis episodes when you select **All Open** from the **View** menu. The following illustration shows an example of Outreach and Crisis episodes appearing together in the Open Episodes grid:

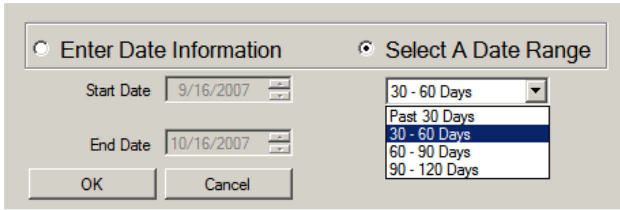


After you select an open episode for a consumer, you can view the service information on the open Crisis or Outreach episodes for the consumer, but you cannot change the data. When you select the **Service** menu or right-click on a service, the system displays a truncated menu that contains only the parameters that you can view, as shown in the following illustration:



6.8. *Changing the Date Range in an Episode Grid*

You can change the date range for an episode grid by selecting the calendar icon in the navigation bar. The following fields appear when you select the calendar icon:



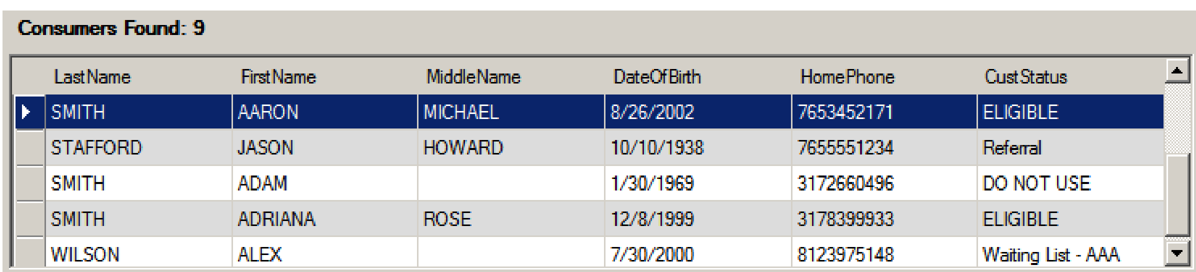
Use the **Enter Date Information** fields to change the start and end date. For example, if you cannot find the open episode you are looking for, you can move the start date of the date range to an earlier date to view different episodes.

Use the **Select A Date Range** fields to display episodes by 30-day groups (for example, 0 - 30 days, 30 - 60 days, etc) up to 120 days, selected from the drop-down list.

6.9. *Viewing Previously Displayed Consumer Records*

You can display a list of the consumers whose episodes you have accessed during the current CRISIS session (the session begins the moment you log into the CRISIS product).

To view previously displayed consumer records, select **Previous Consumer** from the **View** menu. The system displays the Consumers Found grid, similar to the following example:



Consumers Found: 9

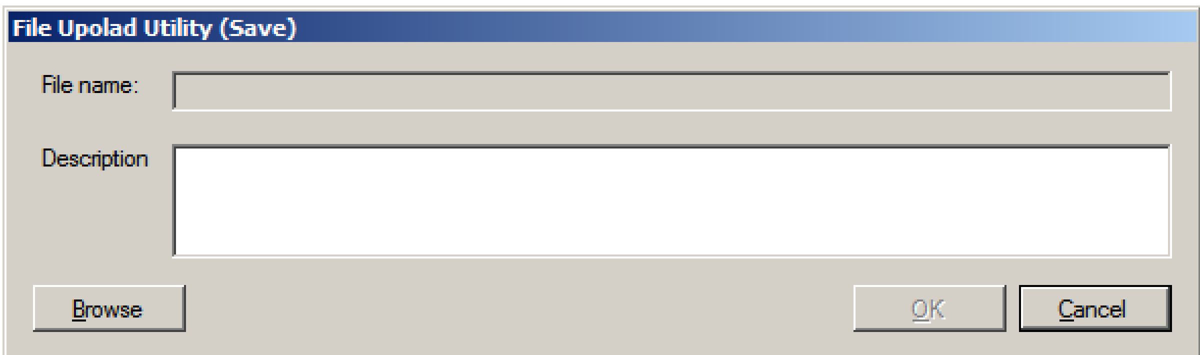
LastName	FirstName	MiddleName	DateOfBirth	HomePhone	CustStatus
SMITH	AARON	MICHAEL	8/26/2002	7653452171	ELIGIBLE
STAFFORD	JASON	HOWARD	10/10/1938	7655551234	Referral
SMITH	ADAM		1/30/1969	3172660496	DO NOT USE
SMITH	ADRIANA	ROSE	12/8/1999	3178399933	ELIGIBLE
WILSON	ALEX		7/30/2000	8123975148	Waiting List - AAA

The Consumers Found grid shows the consumers you have displayed by using the search fields during the current CRISIS session. You can double-click a consumer record to redisplay the episode and add or change the service entry information.

6.10. Attaching (Uploading) a Document to an Episode

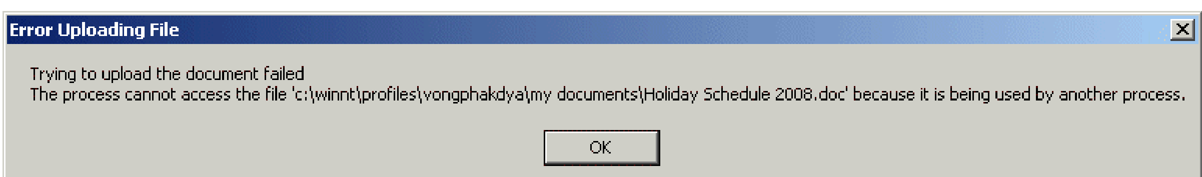
You can attach a document that is either too large for the Service Notes window or too general in nature for notes in a specific service, and must be attributed to the current open episode instead.

To save a document to an open episode, select **Upload (Save)** from the **Document** menu. The **File Upload Utility (Save)** window appears, as shown in the following illustration:



Important

The document you are uploading must be closed. If you attempt to upload a document that is open on your computer, an error message similar to the following example appears:



The following table describes the fields and buttons in the **File Upload Utility (Save)** window.

File Upload Utility (Save) Fields and Buttons

Field or Button	Description
File Name	Use this field to enter the directory path to the document, if you know it. You can also use this field to copy and paste the location of the document. **Important** The file that you select MUST contain a file extension (for example, .DOC or .XLS). The system cannot upload a document that lacks a file extension.

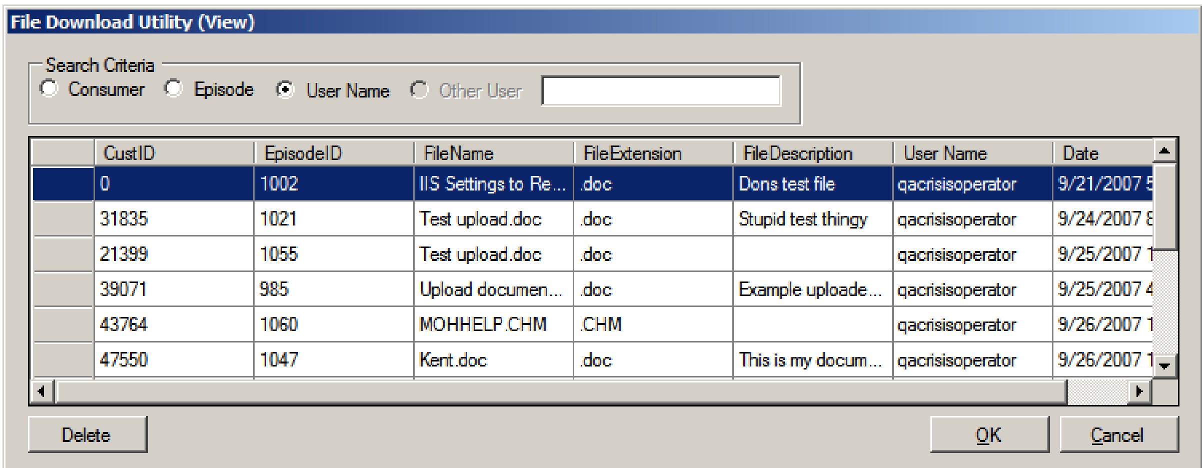
File Upload Utility (Save) Fields and Buttons (Continued)

Field or Button	Description
Description	Use this field to add a brief description to the document to make it easier to find later.
Browse	Select this button to manually browse for a document. Use the **Open** window that appears to locate and select the file to upload.
OK	Select this button to complete the attachment of the document to the open episode and save the document to the DDRS database. **Important** You must enter a name in the **File Name** field and a description in the **Description** field to activate this button.
Cancel	Select this button to cancel the upload process and close the **File Upload Utility (Save)** window.

6.11. Viewing (Downloading) a Document on an Episode

To download (view) a document from an episode, select **Download (View)** from the **Document** menu.

The **File Download Utility (View)** window appears. A list of documents appears in the search grid on the window, as shown in the following illustration:



To download a document to view, you can double-click the document in the grid, or highlight the document and select **OK**.

When you download a document from the DDRS database, the system displays the document in the appropriate application (for example, a Word or Excel), providing that the application exists on the computer you are using to run the CRISIS product.

The following table describes the fields and buttons in the **File Download Utility (View)** window.

File Download Utility (View) Fields and Buttons

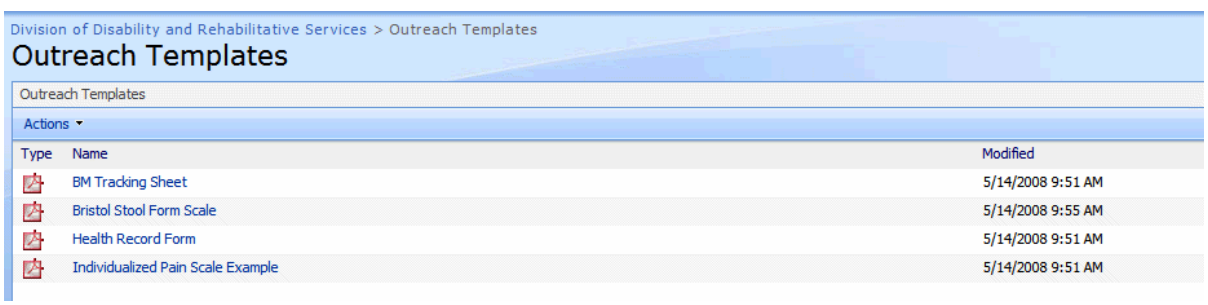
Field or Button	Description
Consumer	Select this radio button to display the documents attached to all closed or open episodes for the currently selected consumer.
Episode	Select this radio button to display the documents attached to the currently open episode.
User Name	Select this radio button to display the documents that only you have attached to consumers or episodes.

File Download Utility (View) Fields and Buttons (continued)

Field or Button	Description
Other User	Enter a user ID in the **Other User** field and then select this radio button to display the documents attached by that user. This radio button becomes selectable only after you have typed a user name in the **Other User** field.
Delete	(Manager function) Select this button to delete the selected document.
OK	Select this button to complete the download process and view the selected document. This button only appears after you select a document from the search grid in the **File Download Utility (View)** window.
Cancel	Select this button to cancel the download process and close the **File Download Utility (View)** window.

6.12. Accessing Outreach Templates

You can access PDF files for commonly used forms and documents (for example, the BM Tracking Sheet, Health Record form, and Individualized Pain Scale Example) by selecting **Templates** from the **Document** menu. The **Outreach Templates** page from the DDRS website appears, as shown in the following partial illustration:



Select a document name to display the PDF for that file.

Important

You must have a PDF viewer loaded on your PC to view a PDF from this page. The Adobe Reader PDF viewer is a popular choice. Click here to display the procedure for installing the Adobe Reader on your computer.

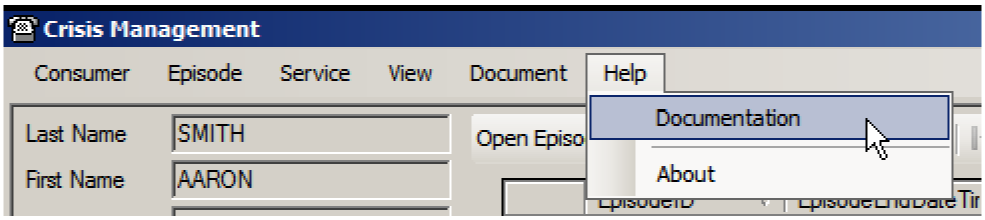
Because all of the documents on this page are read-only, you must print a hard copy of any forms and complete the form by hand.

7. The Help Menu

The **Help** menu contains items that you can use to:

- Access the CORM product documentation on the DDRS website.
- Display the version number and copyright information about the CORM product.

The following illustration shows an example of the **Help** menu:

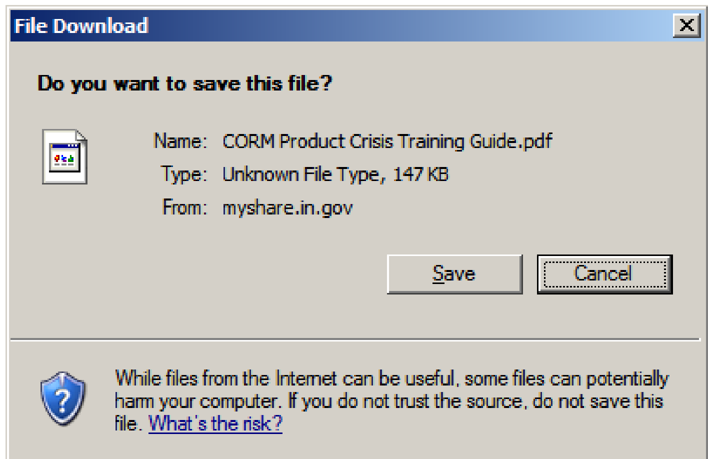
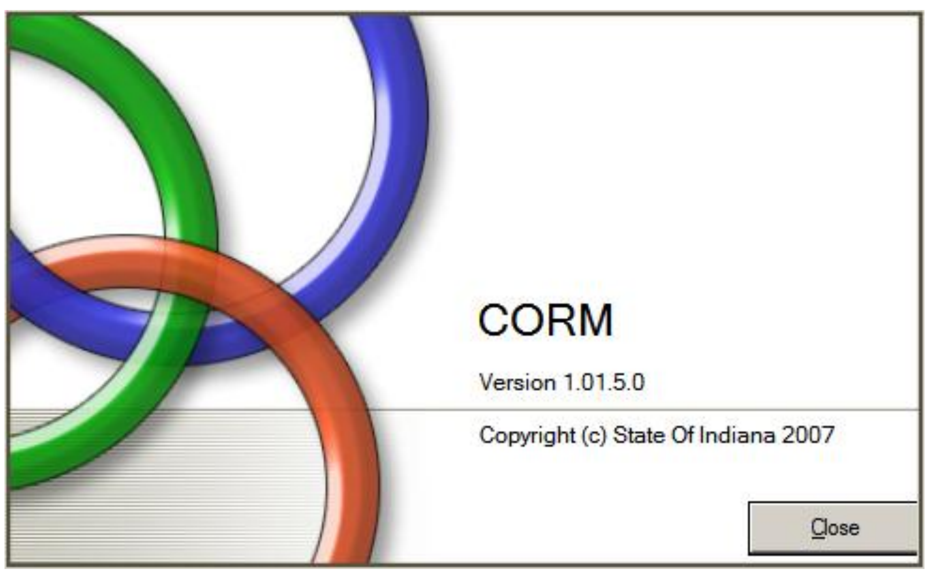


The following table describes the **Help** menu items.

Help Menu Items

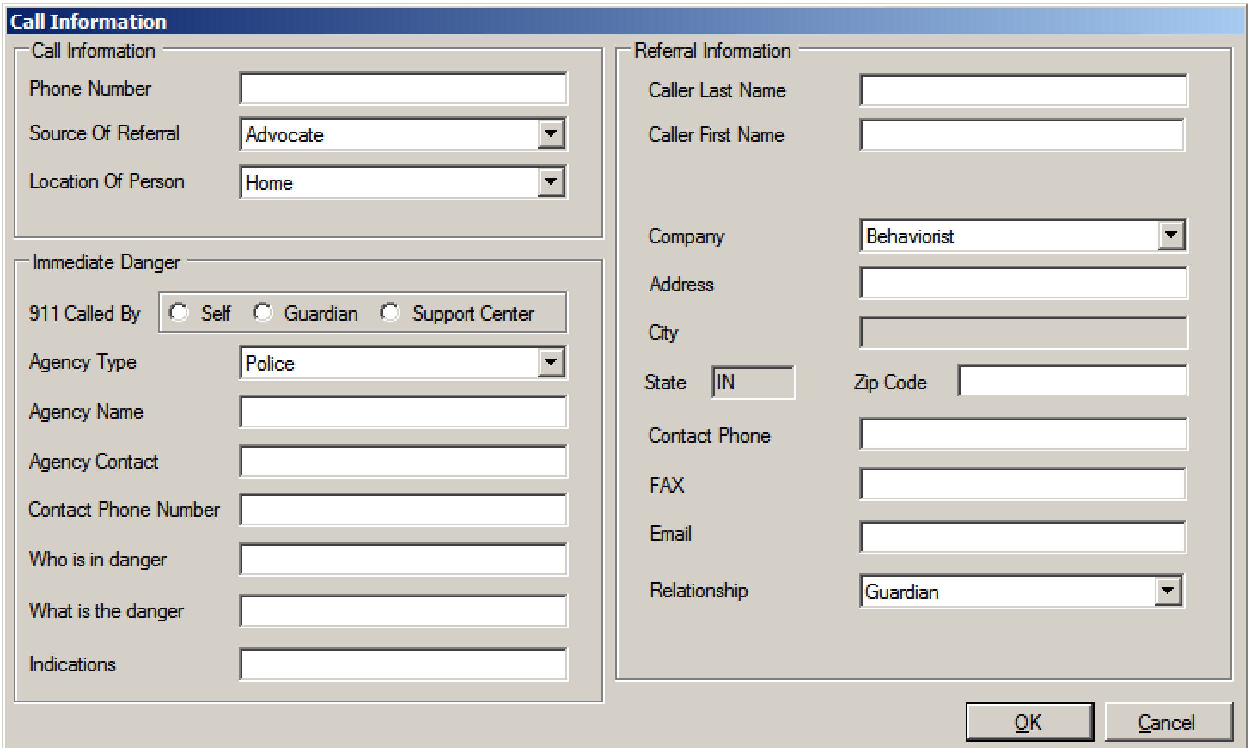
Item	Description
Documentation	Displays the CORM document library in the DDRS website. The CORM document library contains multiple PDF documents about the CORM product, including a PDF file for the most recent version of this user guide. The following illustration shows an example of the CORM document library: 

Help Menu Items (continued)

Item	Description
Documentation (continued)	When you select a document title, the system displays the document in a separate window. **Important** If a window similar to the following example appears instead of the document, you do not have a PDF viewer loaded on your computer:  You must have a PDF viewer loaded on your PC. The Adobe Reader PDF viewer is a popular choice. Click here to display the procedure for installing the Adobe Reader on your computer.
About	Displays the following window, which shows the version number and copyright information for the CORM product: 

Appendix A: Call Information Window Fields

The following illustration shows an example of the Call Information window:



The following table describes the fields in the **Call Information** section of the **Call Information** window.

Call Information Fields

Field	Description
Phone Number	This field contains the phone number from where the person is calling. Enter the phone number for the location of the person who is calling in.
Source of Referral	This field contains the title of the person or organization that placed the phone call. Valid entries for this field include: • **Advocate** • **BDDS Service Coordinator/District Office** • **Behaviorist** • **BQIS** • **Case Manager** • **CMHC** • **Family**

Call Information Fields (continued)

Field	Description
Source of Referral (continued)	• **Guardian** • **Hospital** • **Individual** • **Inpatient** • **Interested Party** • **Jail** • **Local School Representative** • **Other** • **OUTREACH** • **Police**
Location of Person	This field contains the location of the person who needs Crisis assistance. Valid entries for this field include: • **Adult Day Services** • **Adult Foster Care** • **Caregiver Support Services** • **Child Foster Care** • **Community** • **Community Based Sheltered Employment Services** • **Community Habilitation and Participation: Community Based, Group** • **Community Habilitation and Participation: Community Based, Individual** • **Facility Based Sheltered Employment Services** • **Family Home** • **Group Habilitation Training** • **Home** • **Hospital** • **Jail** • **Mall** • **Nursing Facility** • **Other Large ICFMR** • **Park** • **PreVocational Services** • **Provider Home** • **Rehab Facility** • **Residential Habilitation and Support** • **Respite** • **Restaurant** • **SGL, Long Term/Short Term Residential** • **State Operated Facility** • **Treatment, Long Term/Short Term Residential** • **Work**

The following table describes the fields in the **Immediate Danger** section of the **Call Information** window.

Immediate Danger Fields

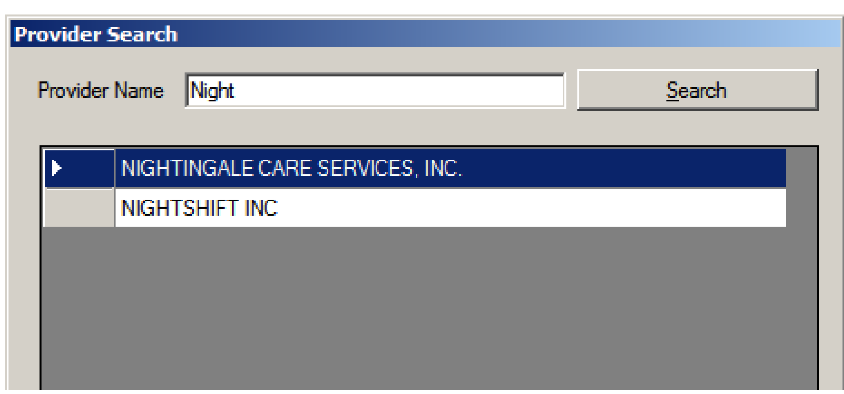
Field	Description
911 Called By	If a call to 911 was placed, select the radio button that most accurately describes who placed the 911 call. Valid entries for this field are: • **Self** • **Guardian** • **Support Center**
Agency Type	This field contains the type of agency to which you referred the person in need of assistance. Select one of the following valid entries for agency type from the drop-down list: • **211 Services** • **911 Emergency** • **APS** • **CMHA** • **CPS** • **ER of Hospital** • **Outreach** • **Police** • **Referral to Agency** • **Risk Management** • **Training**
Agency Name	This field contains the name of the agency to which you referred the person in need of assistance. Enter the name of an agency.
Agency Contact	This field contains the name of the primary point of contact at the agency to which you referred the person in need of assistance. Enter the name of the primary contact.
Contact Phone Number	This field contains the phone number of the primary point of contact at the agency to which you referred the person in need of assistance. Enter the phone number for the primary contact.

Immediate Danger Fields (continued)

Field	Description
Who is in danger	This field contains the name of the person who is in danger or for whom the emergency call was placed. Enter the name of the person who is in danger.
What is the danger	This field contains the description of the situation that prompted the 911 emergency call. Describe the situation that prompted the emergency call.
Indications	This field contains the physical indications that the person in danger has exhibited. Enter the indications that the person in danger has exhibited.

The following table describes the fields in the **Referral Information** section and the **Search Provider** button at the bottom of the **Call Information** window.

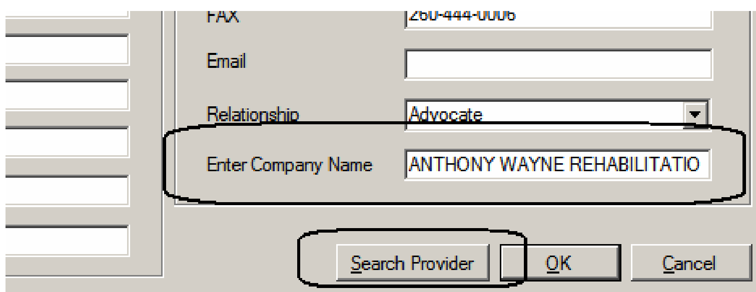
Referral Information Fields

Field or Button	Description
Caller Last Name	This field contains the last name of the person who placed the call or referral. Enter the last name of the person who placed the call or referral.
Caller First Name	This field contains the first name of the person who placed the call or referral. Enter the first name of the person who placed the call or referral.
Company	This field contains the name of the company with whom the caller works. Select one of the following valid entries for the name of the company with whom the caller works from the drop-down list: • **BDDS** • **Behaviorist** • **Family** • **Other** • **Police Department** • **Provider** • **Psychiatrist** • **QMRP** When you select **Provider**, the **Provider Search** window appears so that you can search for an existing provider. Enter a provider name or portion of a provider name in the **Provider Name** field and select **Search**. The search results appear in the list box, as shown in the following partial illustration: 

Referral Information Fields (continued)

Field or Button	Description
Company (continued)	After you select a provider from the **Provider Search** window, the system automatically populates one or more of the following fields in the **Referral Information** section of the **Call Information** window: • **Address** • **City** • **State** • **Zip Code** • **Contact Phone** • **FAX** • **Email** • **Relationship** • **Enter Company Name**
Address	This field contains the street address of the location where the incident occurred. Enter the address of the location where the incident occurred.
City	This field contains the name of the city where the incident occurred. Enter the city for the address of the location where the incident occurred.
State	This field displays the state where the incident occurred, and is automatically generated according to the postal code that you enter into the Zip Code field.
Zip Code	This field contains the postal code for the address of the location where the incident occurred. Enter the postal code for the address of the location where the incident occurred.
Contact Phone	This field contains the phone number of the person who is acting as the primary contact for this referral. Enter the phone number of the primary contact for this referral.
FAX	This field contains the phone number to use to send a facsimile to the primary contact for this referral. Enter the fax number of the primary contact for this referral.

Referral Information Fields (continued)

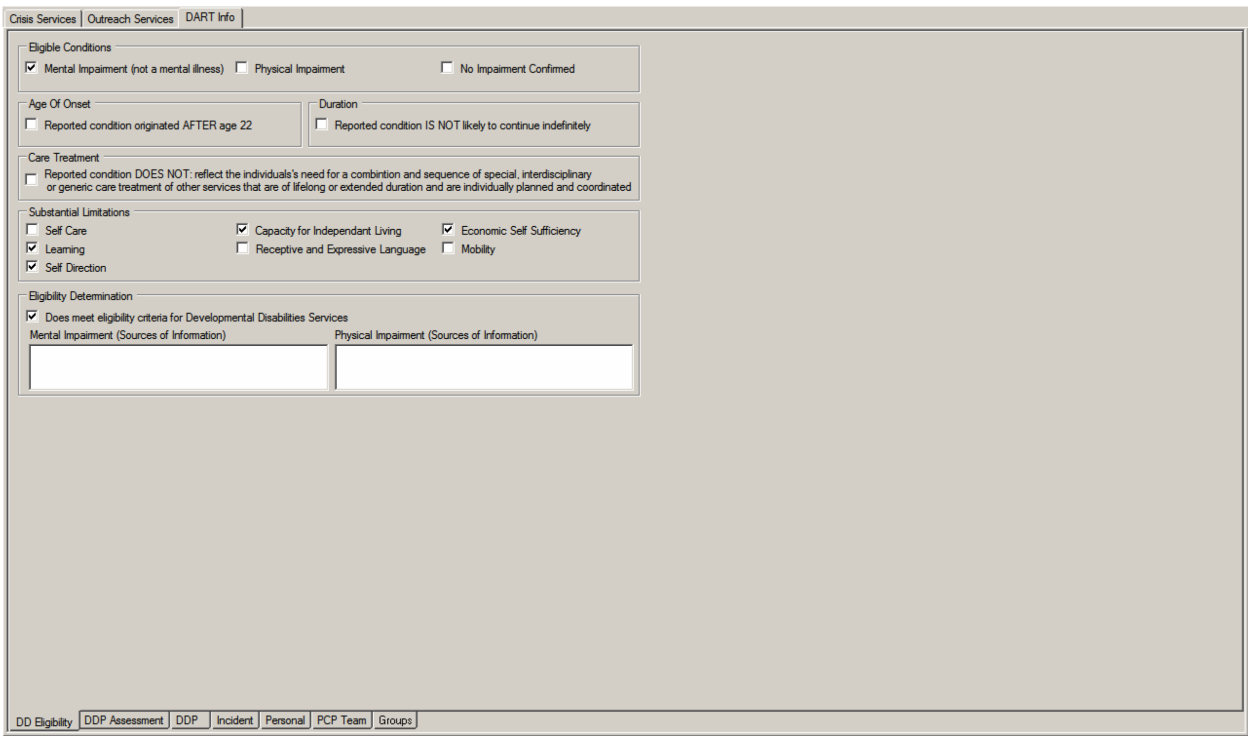
Field or Button	Description
Email	This field contains the email address to use to converse electronically with the primary contact for this referral. Enter the email address of the primary contact for this referral.
Relationship	This field contains the relationship of the primary contact to the consumer. Select one of the following valid entries from the drop-down list: • **Advocate** • **Case Manager** • **Direct Care Staff** • **Family** • **Guardian** • **Provider**
Enter Company Name and **Search Provider** button	The system displays the **Enter Company Name** field and the **Search Provider** button when you select **Provider** from the **Company** field. The following partial illustration shows the location of these items:  You can manually enter a provider name in the **Enter Company Name** field or select **Search Provider** to perform a search in the **Provider Search** window.

Appendix B: DART Information Screens

When you select the **DART Info** tab, DART information for the consumer appears, as shown in the following series of illustrations. The additional tabs at the bottom of the screen correlate to other screens in the DART product. The information is read-only. While you can select radio buttons, select or deselect check boxes, and add text to fields, the system does not save the changes.

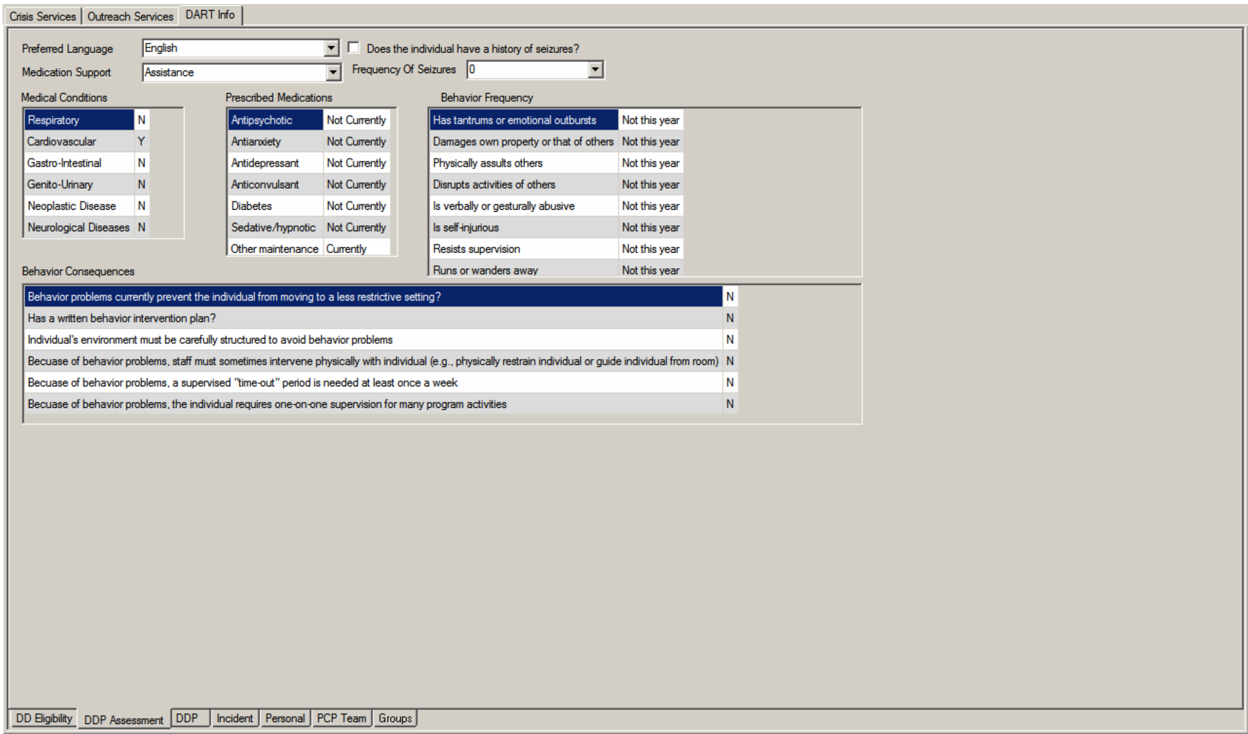
DD Eligibility Tab

The following illustration shows an example of the contents of the **DD Eligibility** tab:



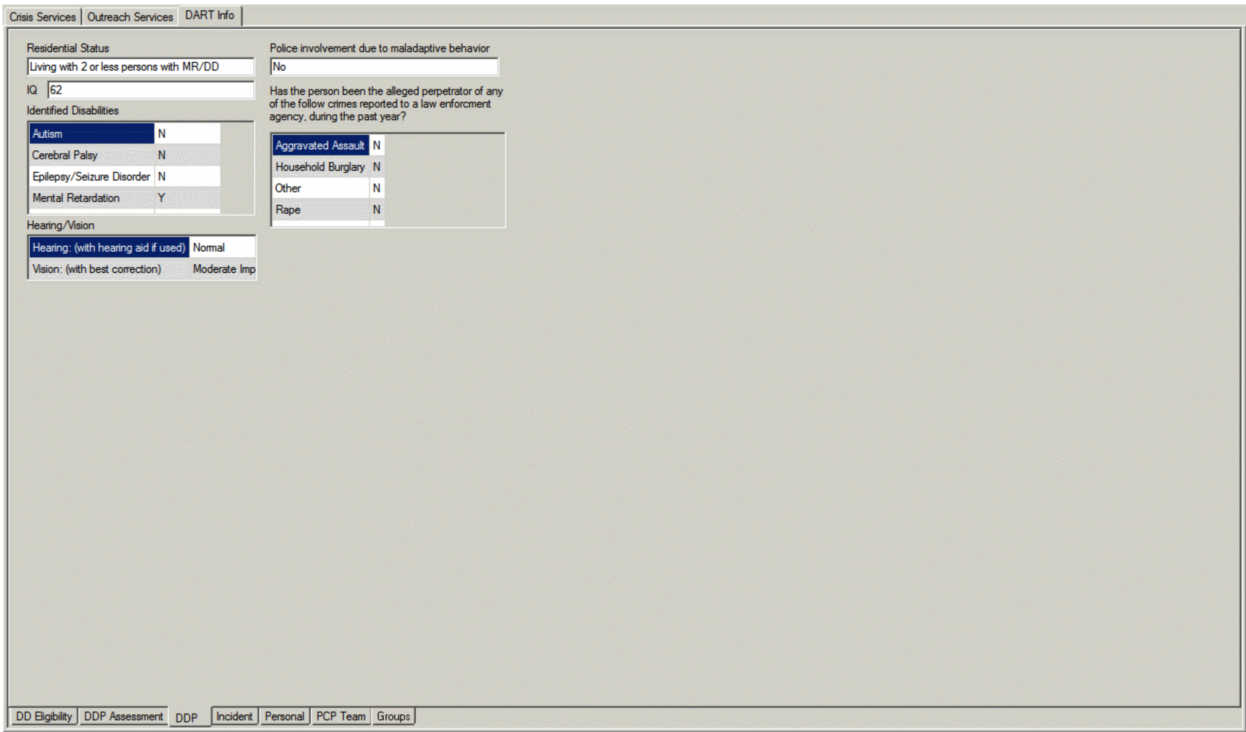
DDP Assessment Tab

The following illustration shows an example of the contents of the **DDP Assessment** tab:



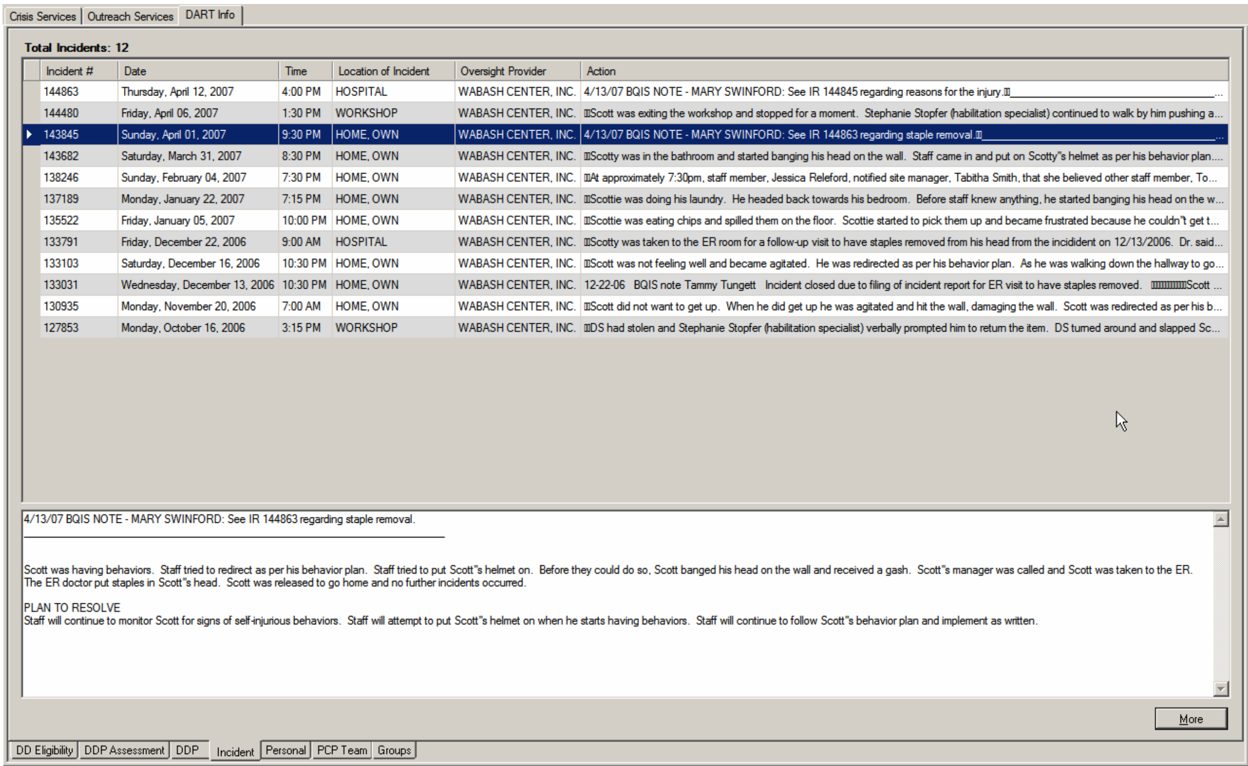
DDP Tab

The following illustration shows an example of the contents of the **DDP** tab:



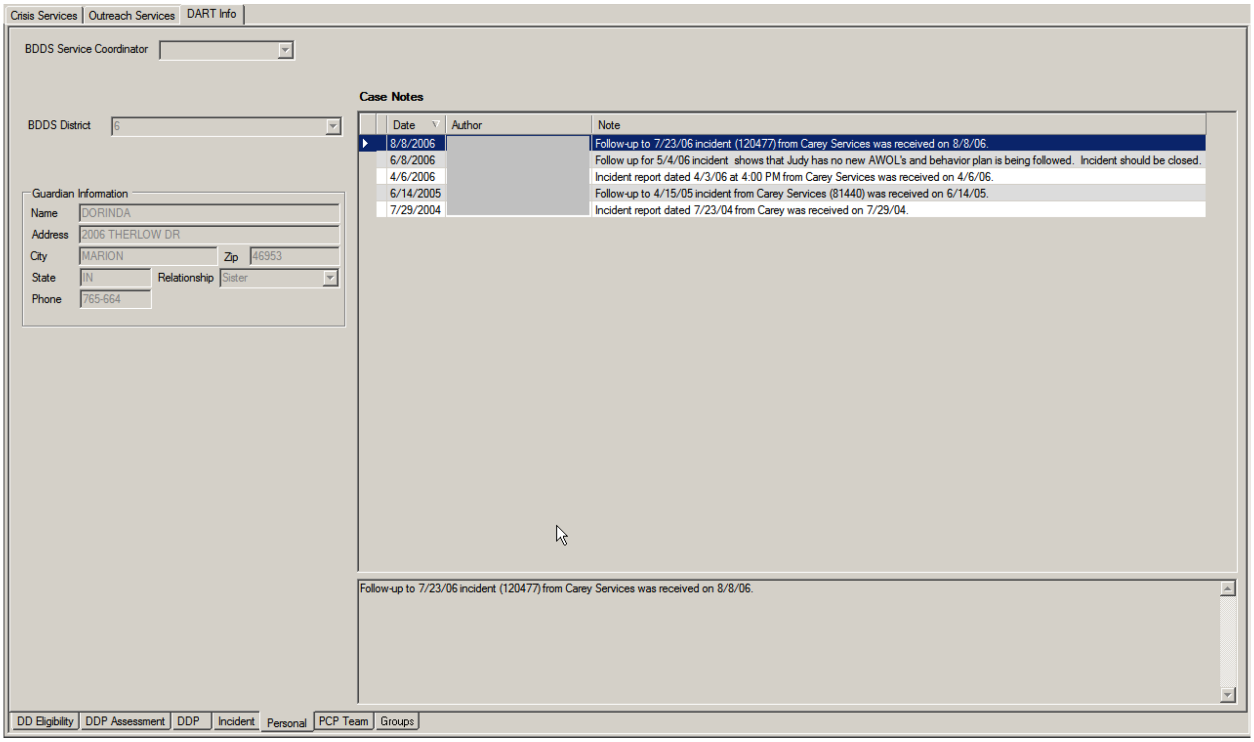
Incident Tab

The following illustration shows an example of the contents of the **Incident** tab:



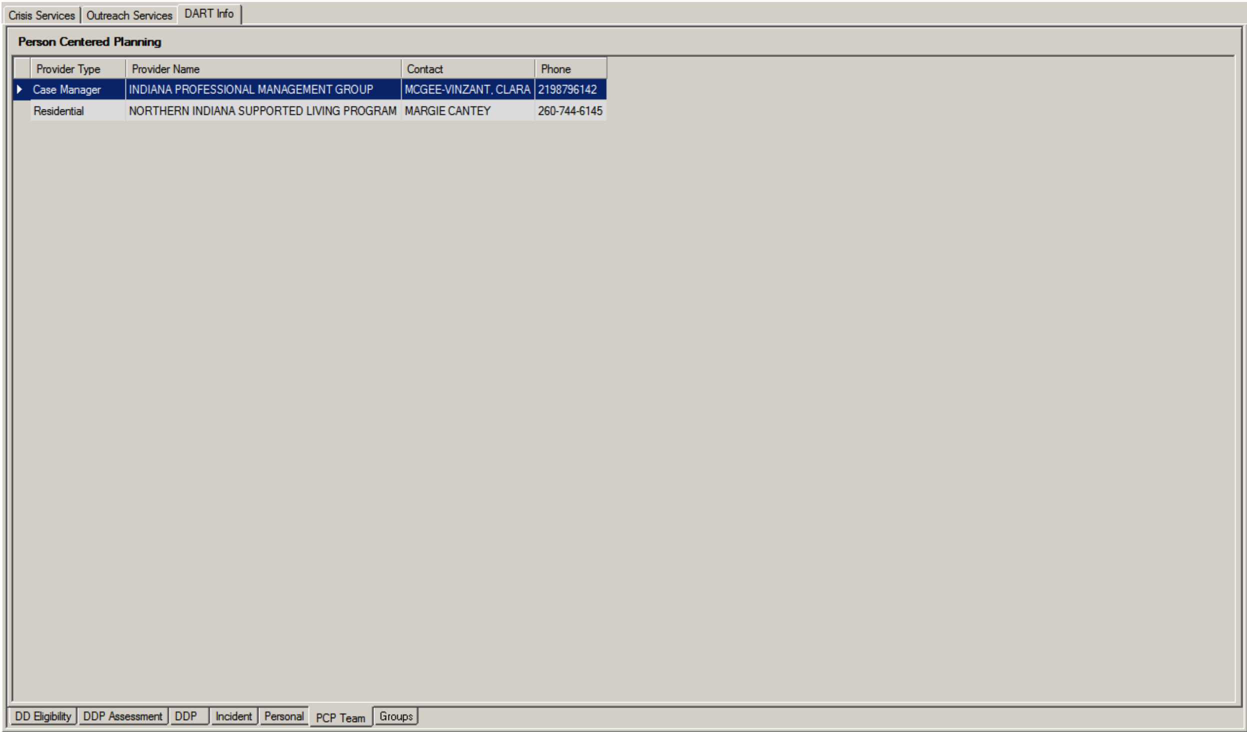
Personal Tab

The following illustration shows an example of the contents of the **Personal** tab:



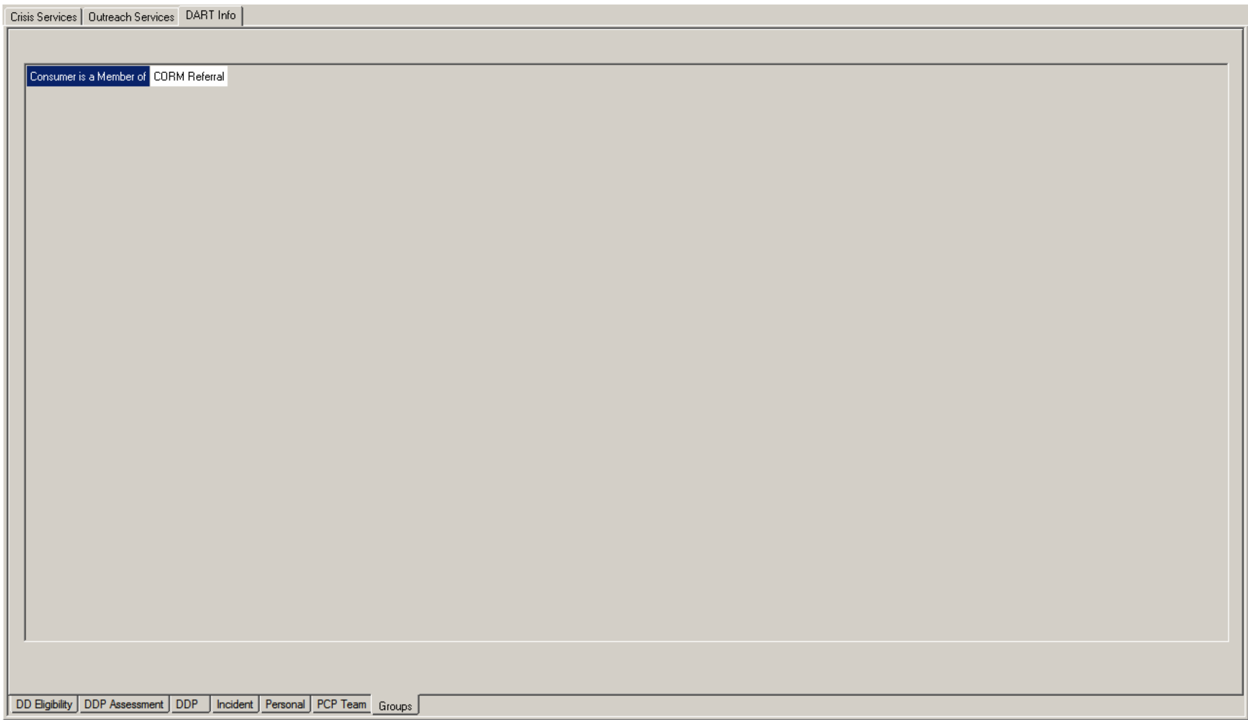
PCP Team Tab

The following illustration shows an example of the contents of the **PCP Team** tab:



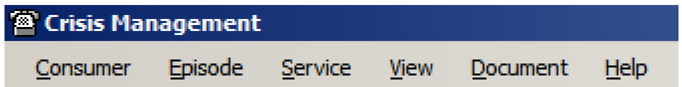
Group Tab

The following illustration shows an example of the contents of the **Group** tab:

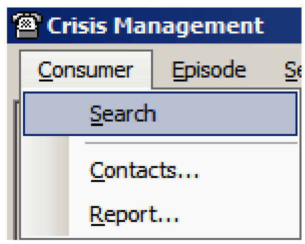


Appendix C: Using Hot Keys

The CRISIS product uses hot keys for the menus on the menu bar. A hot key is a combination of keys that you press to display and select menus and menu items. Each hot key works in conjunction with the **Alt** key and is identified by an underlined letter in the menu name, as shown in the following illustration:



For example, the letter **C** on the **Consumer** menu indicates that if you press and hold the **Alt** key and then tap (press and release) the **c** key, the **Consumer** menu will expand, as shown in the following illustration:

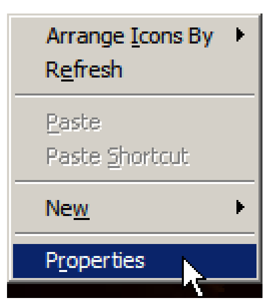


Tip

If the menu names on your CRISIS screen do not contain underlined letters, press the **Alt** key to display the underlines under the hot key letters.

To permanently display the underline on hot key letters, use the following steps:

1. Minimize the windows on your screen to display the Windows Desktop.
2. Point to a blank area of the Desktop and right-click.
3. Select **Properties** from the short cut menu that appears, as shown in the following illustration:



4. Select the **Appearance** tab in the **Display Properties** window that appears.
5. Select the **Effects** button near the bottom of the **Appearance** tab.

6. Uncheck the **Hide underlined letters for keyboard navigation until I press the Alt key** check box in the **Effects** window.
7. Select **OK** in the **Effect** window.
8. Select **Apply** and then **OK** in the **Display Properties** window.

After you display a menu, you can either select one of the items from the menu by pressing the corresponding hot key, or you can press the **Left Arrow** or **Right Arrow** key to expand a different menu.